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***The Process of Discursive Institutional Work in Creating an Innovative
Degree Development Practice: An Institutionalisation Approach to
Innovation***

A dissertation presented

by

Frances Elizabeth Gunn, M. A., B. Commerce

to

The Open University Business School

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for the degree of

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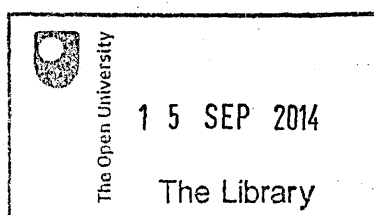
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Abstract

Developing sector-specific university degrees is a challenging process for universities and sectoral members. The development of these degrees needs to incorporate industry-specific resources whilst satisfying the universities' institutional degree requirements. The process is particularly problematic when there has not previously been a degree devoted to the sector and when there has not been sector-wide communication about the need for a degree. This study provides an empirical investigation of the development of Canada's first retail management degree and examines how discursive processes constituted an innovative practice of sector-specific degree development in a fragmented, occupational field. These processes were innovative because they involved a corporate-university partnership, multiple collaborations of institutional and corporate embedded actors, and particular forms of legitimating discursive work. Given the institutional nature of the university, this practice represents a process of institutionalisation, whereby the innovative practice becomes a legitimate means of degree development. By examining this unique case, this study develops an analytic framework to analyse discursive institutionalisation through archival documentation and qualitative interviews. The discursive work performed through the data is characterised by the prominence of generalised issues, and by the nature of its synchronicity, recursiveness and convergence. The resulting institutionalisation processes perform discursive institutional work that is purposive, synchronised, recursive and convergent. This study therefore provides an understanding of how discursive processes institutionalise an innovative practice of retail management degree development.

Dedication

I dedicate this to the dear people I lost during the writing of this thesis -
Joan Elizabeth Stewart, Dr. Patricia Grundy Gunn, Cheryl Anne Wills,
Mom, GranPat and Cheryl.

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I could not have written this thesis without the help of many people and organisations.

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Jim Chestnutt's archive was the inspiration and focus for this PhD. I'll be forever grateful for his generosity and for his dedication and commitment to the important work of the Eaton School of Retailing project. Phil Schalm's work also deserves special mention as it was integral to the progression of the project to becoming the current degree. And this PhD thesis recognises the late Tony LaMantia as a true educational visionary.

Finally, thank you to my medical and recovery teams, who enabled me to acquire two new hips in addition to a PhD thesis – Drs. Benfayed and Stern, the physiotherapists at Ajax-Pickering Hospital and Lifemark Physiotherapy, P3Yoga and Zander Townend.

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The Process of Discursive Institutional Work in Creating an Innovative Degree Development Practice: An Institutionalisation Approach to Innovation

Introduction

This thesis focuses on a challenge that faces universities and members of the retail industry concerned with retail management education: how to integrate industry input in the development of retail management degrees. This challenge exists because universities have well-established and regulated processes about degree development, that do not typically involve industry in the development of curriculum (Marshall, 2004), and because the retail sector is not uniformly committed to participating in retail management education (Bernhardt, 1999). This situation is particularly problematic when there has not been a previous degree devoted to the sector, and when there has not been sector-wide communication focused on retail management education. Universities and members of the sector are, therefore, challenged to develop new degree development processes that integrate the universities' institutional requirements and the interests of the industry's diverse members. This study, therefore, aims to contribute to understanding the complexities related to this challenge by answering the research question:

How do discursive processes institutionalise an innovative practice of retail management degree development?

In order to answer this question, this study provides an empirical investigation of the development of Canada's first university degree in retail management. This particular case involved innovative processes that originated with a corporate-

university partnership, mobilised multiple interorganisational collaborations, and utilised diverse forms of discursive work.

This Introduction will provide a discussion of the reasons for studying this particular challenge. It will also provide definitions of the central concepts that informed the study's development. The structure and content of each Chapter is then described.

Retail Management Education in Canada: An Innovative Degree Development Practice

The development of this retail management degree occurred between 1993 and 1999, and prior to that time, retail management degrees had not been offered by Canadian universities. Although Canadian retailing is an economically and socially significant sector (Industry Canada, 2010), Canadian universities had not focused on research or educational linkages with the retail consumer service sector, which this study defines as "a set of business activities that add value to the products and services sold to consumers" (Levy et al., 2011, p.6).

Since the 1990s, there have been tensions between increased demands for Canadian university programming and decreased government funding (Marshall, 2004). In response, Canadian universities have implemented strategies for increasing programming options and resulting enrollments, while containing costs. In particular, they have developed partnerships and collaborations with other post-secondary institutions, industry, governments, agencies, community groups and corporations (Crocker and Usher, 2006; Marshall, 2004). In addition to increased programming options, these collaborations have brought many benefits to universities, including funding and marketing opportunities (Crocker and Usher,

2006; Elmuti et al., 2005; Snowdon, 2005; Marshall, 2004). For example, Canadian universities implemented innovative degree development processes that delivered all or parts of degrees through community colleges and non-traditional delivery mechanisms (i.e. distance education) (Crocker and Usher, 2006; Marshall, 2004). However, this study examines a process that originated with a corporate-university collaboration, rather than previous processes which had featured collaborations with colleges or innovative delivery mechanisms (Crocker and Usher, 2006).

Prior to this degree development process, corporate-university collaborations were prevalent within sectors like technology and medicine that relied on applied research knowledge from science and engineering and were not common with consumer service sectors, like retailing (Marshall, 2004). In addition, the majority of corporate-university partnerships had been directed at developing research goals and not at the development of undergraduate degrees (Crocker and Usher, 2006). Correspondingly, studies of corporate-university partnerships had generally been aimed at research-oriented collaborations and few studies had examined the dynamics and processes of corporate-university collaborations aimed at undergraduate degree development.

At the same time, corporate-university collaborations related to degree development raised concerns about the possibility that universities may lose control of the creation and administration of curricula (Slaughter and Leslie, 1997; Buchbinder and Newson, 1990). These concerns were related to beliefs about universities' roles as public institutions, responsible for the legitimacy of higher education credentials (Trank and Rynes, 2003; Slaughter and Leslie, 1997; Buchbinder and Newson, 1990). Thus, by examining processes that incorporated

corporate-university collaborations, this study will also determine how these processes are legitimated.

An Institutionalisation Approach to Innovation

The collaborative process constitutes an innovative practice in Canadian universities. These universities are regarded as institutions of higher learning (Crocker and Usher, 2006). Institutions are “multifaceted, durable social structures made up of symbolic elements, social activities, and material resources” (Scott, 2001, p.49), which have a rule-like, factual quality, and are embedded in formal structures, like university degree development processes. Furthermore, this study defines an institutional innovation as a change in an institution’s quality or structures “that is a novel or unprecedented departure from the past.” (Hargrave and Van de Ven, 2006, p.866). In particular, when applied to university practices, the term “innovation” means changes in general practices at a university that are “designed to position an institution at the forefront of some area of teaching and learning or knowledge mobilization and, hence, to differentiate the institution in some way from other similar institutions.” (Crocker and Usher, 2006, p. 1). This study therefore takes an institutional approach to examining the creation of an innovative degree development practice.

Institutions are composed of cultural-cognitive, normative, and regulative elements that, together with “associated activities and resources, provide stability and meaning to social life.” (Scott, 2001, p.48). Regulative elements are imposed by institutions of the state (i.e. governments) which provide rules that regulate processes. Normative elements arise from commonly held expectations about roles and processes and cultural-cognitive elements are related to shared

perceptions of meaning (Scott, 2001). The legitimacy of these elements contributes to their institutionalising nature. Legitimacy is defined as “a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions” (Deephouse and Suchman, 2008, p. 52; Suchman 1995, p. 574). Legitimacy is a key characteristic of any institution (Hurley and Sa, 2013; Scott, 2001), in that it is a socially constructed, cultural-cognitive condition that deems organisational actions as appropriate (Scott, 2001).

Institutional elements include structures, actions and roles which legitimate other elements, and a university degree development process is an institutional element. This study asserts that institutional elements confer legitimacy, and thereby claims that generation of new institutional elements is the main process of institutionalisation. As stated by Zucker (1987, p.446) “Institutional elements are easily transmitted to newcomers, are maintained over long periods of time without further justification or elaboration, and are highly resistant to change”. Therefore, by culminating in a newly formed institutional element, the collaborative development practice constitutes an innovative process of institutionalisation.

In particular, this study examines how discourses about professionalisation carry the necessary legitimisation of the degree development practice. Scott (2008, p.223) defines institutional carriers as “definers, interpreters, and appliers of institutional elements”, and professionalisation is viewed in institutional research as a carrier of institutional elements (Muzio et al., 2013; Scott, 2001; Reed, 1996).

Institutional theories focus on how institutionalised structures affect processes in organisations and consequently highlight the processes by which structures become established as legitimate guides for social behaviour (Scott, 2004).

Viewing legitimacy as a socially constructed condition reflects an ontological perspective of a world continually in flux. This perspective thereby provides this study's foundation for viewing the creation of innovative institutional practices as multiple organisational processes. The epistemological perspective taken by this study is that these institutionalising processes are constituted by the discursive agency of organisational actors situated within a common field of interest. Their discursive work is influenced by cognitive, normative and regulative pressures and guided by legitimated institutional elements (Phillips et al., 2004). By taking this epistemological perspective, this study claims that the discourses produced by these actors legitimise the development of new institutional elements, and thereby constitute an institutionalising process (Phillips et al., 2004).

Ultimately, this study provides a process model of institutionalisation that illuminates new practice origins. This process model provides a way to understand how innovative institutional practices emerge and develop over time (Langley et al., 2013; Hargrave and Van de Ven, 2006), and includes the characteristics of a process theory: a clear sequence, focal actors, a point of view, an evaluative frame of reference, and indicators of context in which the process occurs (Langley et al., 2013; Pentland, 1999).

This process model incorporates dimensions of institutional work theory as the lens through which the discursive work involved with the degree development processes is examined. Institutional work is defined as "the purposive action of individuals and organizations aimed at creating, maintaining, and disrupting

institutions" (Lawrence and Suddaby, 2006, p. 216). Institutional work therefore provides a way to examine the organisational processes and the roles of actors associated with developing discursive work. This model of institutionalisation processes is therefore a conceptual framework of discursive institutional work (DIW).

Given that this study's approach regards institutionalisation as a socially constructed process, the roles that the constituent organisational actors play within a field are central to the approach. DiMaggio and Powell define a field as "sets of organizations that, in the aggregate, constitute an area of institutional life." (1983, p. 148). The area of institutional life examined in this study is constituted by "knowledgeable actors (who) interact with common understandings about the field's purposes, relationships and rules" (Fligstein and McAdam, 2012, 2011). Specifically, this study examines the Canadian retail management education field. By virtue of its geographic setting and national state, this is an institutional field that corresponds to "the populations, organizations, and markets located in a geographic territory and sharing, as a result of their common location, elements of local culture, norms, identity, and laws" (Marquis and Battilana, 2009, p. 286).

This study examines the organisational actors within this field, claiming that these actors are organisations that have the capacity and responsibility to act on behalf of others (Meyer and Jepperson, 2000). These organisational actors exist as agents "who are socially constituted as active and acting in the field under consideration by the fact that they possess the necessary properties to be effective, to produce effects, in this field." (Bourdieu and Wacquant, 1992, p. 107). In other words, these organisational actors have agency by virtue of their capacity for action and to "reproduce and transform an environment's structures" (Battilana

and D'Aunno, 2009, p.46). These actors' agency is influenced by common understandings of the institutional pressures influencing the innovative process (see Chapter 1, Sections 1.2, 1.3. 1.4).

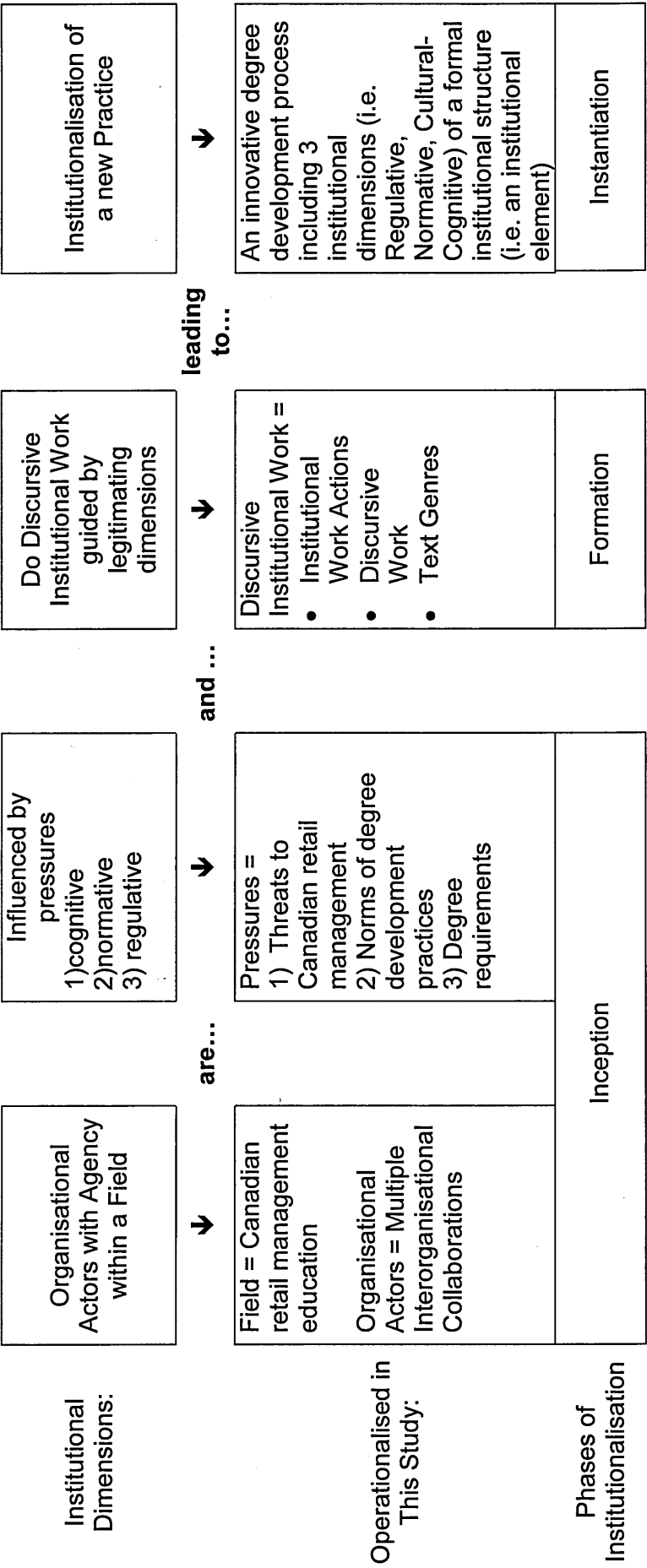
At the same time, by adopting an institutional perspective, this study acknowledges that the agency of actors embedded (i.e. situated) within fields is influenced by the nature and related influences of their institutional fields and by their locations within those fields (Friedland and Alford, 1991). This study investigates how this notion of 'embedded agency' (DiMaggio and Powell, 1983) contextualises the roles of the corporate actors in the various collaborations involved with the processes.

The role of actors in creating and diffusing innovations has been addressed by institutional researchers through the concept of institutional entrepreneurs (Greenwood and Hinings, 1996; DiMaggio, 1988). Institutional entrepreneurs are individual actors with sufficient resources to generate new institutions when they see worthwhile opportunities (Leca et al., 2008; Seo and Creed, 2002; DiMaggio, 1988). However, this study focuses on the collective agency of collaborative organisational actors, arguing that institutionalising processes were mobilised by their heterogeneous interests and resources (Lounsbury and Crumley, 2007; Maguire et al., 2004). This study's process model of institutionalisation therefore features distributed agency, involving diverse actors working in a coordinated way, and building on the interpretive work of others (Delbridge and Edwards, 2008; Garud and Karnoe, 2002; Perkmann and Spicer, 2007).

The Case of Canadian Retail Management Education

To aid in the theoretical building dimension of this thesis, which is central to its theoretical contribution, the study draws on the empirical case of the development of Canada's first Retail Management degree, which is situated at Ryerson University in Toronto. The case began in 1993, with a partnership between the T. Eaton Company Ltd., which, at the time, was a dominant Canadian department store chain, and Ryerson University. This study examines the degree development process starting with the inception of this partnership, named the Eaton School of Retailing (ESR). This inception phase evolved to include multiple interorganisational collaborations, which then engaged in multiple forms of institutional work during the second formation phase of the degree. Finally, the process culminated in the instantiation phase which featured the University's institutional approval of the degree. These three phases constituted the institutionalisation processes engaged in by the multiple collaborations involved with the degree development. Figure 1 presents how the phases of the empirical case operationalise the dimensions of institutionalism that constitute this study's process model of institutionalisation.

Figure 1: Institutionalisation Process as Operationalised in this Study.



As outlined above, the case is set in the Canadian retail management education institutional field, which is constituted by heterogeneous institutional influences. Within the Canadian university sector, universities are public institutions that have legal authority to grant degrees. The Canadian constitution assigns responsibility for university education to the provincial level of government. University education policy is decentralised and there is no federal university policy framework (Canadian Council on Learning, 2010).

The specific innovation examined in this study is the collaborative degree development process that generated the Retail Management degree. This innovative practice was specifically designed to position Ryerson at the forefront of Canadian retail management education. It therefore constitutes an innovative change to the typical Ryerson degree development processes which originate in the traditional teaching and research faculties. The genesis of this innovative degree development practice is a partnership between a corporation (Eaton's) and Ryerson's Continuing Education (CE) Faculty. The process then progresses through multiple, interorganisational, discursive collaborations. Most Canadian universities have CE departments that develop cost recovery programs, and generate revenue for the university while meeting needs for upgrading and specialised training. They offer vocational certificate and diploma programs, but do not usually offer degree programs (Jones, 2009).

This study utilises a case study methodological approach and adopts the epistemological perspective that the discourses produced by the actors in the case are the processes which constitute the new degree development practice. This study

defines discourse as a set of interrelated texts that, along with the related practices of text production, distribution, and consumption, brings an object or idea into being (Phillips et al., 2004; Fairclough, 1995; Parker, 1992). The texts examined in the study include written or spoken language, and visual representations (Grant et al., 2001). Discursive work is defined as “discursive activity carried out to influence processes of social construction” (Phillips and Lawrence, 2012, p. 225). This study argues that, when produced in an institutionalisation process, this discursive activity constitutes discursive institutional work (DIW). This current study, thus, examines the incremental discursive institutional work involved with the process of institutionalisation in the development of the degree.

The following section describes how this thesis is organised. Ultimately, the chapters are ordered to present a comprehensive discussion of the development of a discursive institutional work (DIW) model through the examination of an empirical case. The model forms the institutionalisation process involved with the creation of a new institutional practice.

Description of the Thesis Chapters

The first chapter sets the context for this study. This chapter discusses the regulative, normative, and cultural-cognitive institutional pressures influencing retail management education in Canada. The chapter provides a discussion of the characteristics of the Canadian university sector (Crocker and Usher, 2006; Marshall, 2004), focusing on corporate-university processes and retail management education. A discussion of the normative influences of US and UK retail management degree

programs and of corporate universities follows. The chapter then explains how the legitimacy of retail management as a career is related to dimensions of professionalism (Muzio et al., 2011). The specific conditions related to the Canadian retail environment are then discussed. The chapter proceeds to a discussion of the origins of the case, presenting an overview of the corporate and academic partners that instigated the process.

Chapter Two develops the conceptual framework for the study through an investigation of the literature related to institutionalisation processes. The chapter begins with a discussion of the theoretical foundations of institutional work theory, including traditional and neo-institutionalism, fields, agency, and processes of institutional change. A discussion of processes of institutional change and the notion of practice work provide a bridge to a review of studies based on institutional work theory. This theory focuses on the actions involved with creating, maintaining, and disrupting institutions. The Chapter then provides an examination of discursive work involved with institutionalisation including a focus on legitimization and professionalising discursive strategies. A review of empirical institutional research in retail management and management education follows. The chapter concludes with a discussion of the gaps and the research objectives that are identified through the review, culminating in the institutionalisation process model featuring discursive institutional work (DIW), and the study's over-arching research question.

Chapter Three presents the methodological approach which provides the analytical framework for this study. The work in this chapter moves from the conceptual phase in Chapter Two to the justification of the methodological approach and links to the

justifications for and practicalities of the case study methodology in Chapter Four. Chapter Three begins with a statement of the study purpose and the research question, followed by a discussion of the philosophical underpinnings of the study. The chapter then discusses the methodological approach which is organisational discourse analysis. Finally, the chapter describes the discursive institutional work (DIW) analytic model that frames this thesis' research approach. This model presents how the DIW theoretical framework is operationalised in the case study analysis.

Chapter Four presents the Eaton School of Retailing (ESR) case study, which provides the setting for the research. The chapter discusses the justification of the case selection for the purposes of this study. The details of the research design, including the research protocols and data collection processes, are then discussed. A step-by-step description of the analysis process follows, including an event listing (Miles and Huberman, 1999) that provides a context for the actions, texts, and discourses produced in the case. The Chapter also provides a discussion of the quality and ethical considerations related to the unique nature of the case, including a reflection of the decisions made throughout the inductive research process.

The purpose of Chapter Five is to analyse the data presented by the case study. The analysis provides a thick description of the case through a comprehensive data analysis. The analysis includes focused discursive examples oriented to patterns and themes in the data and data displays that summarise the analysis results. The Chapter culminates in an explanatory analytic model which captures the distinctive methodological approach developed through this study. As a result, Chapter Five provides a comprehensive basis for the discussion of the results in Chapter Six.

Chapter Six presents a discussion of the findings from the analysis presented in Chapter Five. In particular, the discussion focuses on how the findings of the analysis satisfy the study's three research objectives. The patterns and themes discovered in the analysis are synthesised and related to each of the objectives, thereby providing the basis for the discussion of the study's contributions, which are presented in Chapter Seven.

The contributions of the study are discussed in Chapter Seven, including theoretical, empirical, methodological and practical contributions. Firstly, from a theoretical perspective, it provides a process model of discursive institutional work (DIW), which is applicable to explanations of innovation-in-action. It provides a way to explain how practitioners draw upon discursive resources in the context of particular activities for purposes of institutional structuration. Secondly, this study provides an empirical example of institutionalisation that provides evidence of the phases of new institutional practice development. Notably, the empirical example of institutional work is set in a previously unexamined consumer service sector, thereby making empirical contributions to retail research. Thirdly, the methodological contribution of this study is its original discursive institutional work (DIW) analytic method. The model provides a methodological approach that operationalises institutional work through discursive analytical processes. Finally, the practical contribution of this study is the insights it provides for educators involved with collaborative degree development, for retail practitioners, and for other occupational sectors who are interested in the processes of professionalisation through degree development.

This final chapter then provides a discussion of suggestions of potential areas for further research, of the limitations of the study, and of the researcher's reflections on the thesis process. Finally, the study concludes by determining the answers to the study's research question:

How do discursive processes institutionalise an innovative practice of retail management degree development?

Chapter 1: The Context: The Canadian Retail Management Education Field

1.1 Introduction

The context for this study is the institutional environment in which the empirical case of the Eaton School of Retailing (ESR) is set. The case is situated in the Canadian retail management education field which was an emergent field, given that there was a dearth of retail management degree programmes in Canada.

This chapter highlights the institutional pressures which influenced how the field emerged and how actors in the field were able to perform the institutional work involved with creating a new degree development practice. Specifically, the chapter is organised around the regulative, normative and cultural-cognitive influences on the organisational actors in the case.

The chapter begins with a discussion of the nature of the Canadian university sector, corporate-university partnerships, and retail university programming. The discussion centres on how the nature of the Canadian university sector presented regulative influences on the development of the retail management degree.

The chapter then discusses how retail management education in the US and UK produced normative influences on the Canadian retail management education field, and particularly, on the development of the degree. These influences affected how the degree development processes integrated collaboration in the degree's curricular structure.

The actors in the field also experienced cultural-cognitive influences about the legitimacy of a retail management degree. The next section in this Chapter discusses these influences in terms of how perceptions about retail management as a professional career affected the degree development. In particular, this section highlights retail management's claims to a specific occupational jurisdiction (i.e. claims about membership), a specific body of knowledge, and requirements for specific educational credentials.

The chapter then presents a description of the case that is the focus of this empirical study. The origins of the case are discussed, presenting an overview of the corporate and university partners that instigated the innovative degree development process.

1.2 Regulative Influences on Canadian Retail Management Degree Development

This study's focal case occurred between 1993 and 1999. At that time, Canadian universities were experiencing institutional pressures to develop increased access to and alternative forms of degree programmes (Snowdon, 2005). As a result, degree development practices were influenced by regulative influences related to shifts in government and university requirements.

Population growth and increased awareness of the importance of higher education fuelled increased participation in Canadian post-secondary education (Snowdon, 2005; Marshall, 2004; Oleksiyenko, 2002). Between 1980 and 2000, full-time university enrolment increased from 390,000 to 630,000 (Junor and Usher 2002). At that time, demand for university education was also affected by increasing

credentialism, as accrediting bodies increasingly required a degree for entry into a profession or for employment (Marshall, 2008). For example, the Certified General Accountants of Ontario (CGA) instituted degree requirements for the CGA designation during this period. Changes in the workplace and related learning expectations increased demands for the types of undergraduate degrees required in technical, professional and vocational workplaces including consumer service sectors like retailing (Marshall, 2004).

While universities across Canada encountered increased demands for university education, they also faced reduced government funding (Hurley and Sa, 2013; Usher and Potter, 2006; Snowdon, 2005). University education is a provincial jurisdiction in Canada and, as stated by Dave Marshall (2004), then President of Nipissing University, "No province in Canada has been able to completely absorb the cost of providing unfettered access to the traditionally delivered university degree credential and, consequently has sought out cheaper alternatives." (p. 78). Consequently, government cutbacks also generated pressures in universities to become more industry oriented (Trank and Rynes, 2003; Fisher and Rubenson, 1998; Buckbinder and Newson, 1990).

As a result, there were calls for university education that combined a focus on industry with the university academic environment (Marshall, 2008; Trank and Rynes, 2003). The Canadian university system responded by expanding the supply of university offerings. Capacity was increased in a number of ways, including university transfer (from college programmes in Alberta and British Columbia) and non-traditional delivery (faith-based, distance delivery and private institutions). Colleges of

Applied Arts and Technology (CAATs) were viewed as potential degree granting sites and unique universities with differentiated missions were introduced. One such university was Ryerson University, which originated as Ryerson Institute of Technology in 1948 and became Ryerson Polytechnic Institute in 1964, providing applied diplomas and degrees. The Institute was granted full university status in 1993, thereby becoming Canada's first career or vocationally-focused university (Doucet, 2007; Marshall, 2008, 2004). Ryerson University is the university actor in this study's focal case.

Although Canadian education is a provincial responsibility, the federal government also participated in the development of higher education, primarily through its jurisdiction in research, training and economic development (Usher and Potter, 2006). During the 1990s, the federal government instigated investments in post-secondary education, emphasising partnerships with the private sector (Usher and Potter, 2006).

Corporate-university partnerships were oriented to optimising Canada's resources in research and education while positioning research efforts and university curriculum to the needs of the marketplace (Maxwell and Currie, 1984). The partnerships represented different types of linkages including research support, knowledge transfer, cooperative research and technology transfer (Crocker and Usher, 2006; Lagiewski and Domoy, 2006). Canadian university presidents supported the linkages and also called for tying university curriculum more closely to the marketplace, as reported by the Corporate-Higher Education Forum, an organisation of Canadian university presidents and corporate executives (Maxwell and Currie, 1984).

There were no Canadian precedents for developing a retail sector-specific degree. Although retailing was a significant contributor to the Canadian economic and social environment (Rinehart and Zizzo, 1995), there were no university programmes focused on retailing. Baccalaureate degrees have always been offered throughout the Canadian university system and they are typically named for the broad area of study they encompass (i.e. Bachelor of Commerce). However, degrees indicating the field of study (i.e. Hospitality Management) have also been offered, particularly in occupational fields (Canadian Council on Learning, 2010), although the university sector did not offer any degrees oriented to retail management occupations. Some Canadian universities structured applied degrees that added an academic component to previous vocational credentials (Marshall, 2008), however there were few post-secondary retail credentials (i.e. college diplomas) that could provide such a structural base for an applied retail degree.

Within the Canadian post-secondary system, universities are required to operate with a bicameral institutional structure. "Bicameral governance consists of shared authority between an academic senate responsible for decisions affecting academic programs and an independent board of governors responsible for the day-to-day management of the institution." (Canadian Council on Learning, 2010, p. 7). In a bicameral system, degree development and approval processes are instituted through a university Senate and originate with full-time academic faculties. Ryerson University operates with such a structure and new degrees require Senate approval to become instituted (Ryerson University Senate Policies #35 and #112). Degree programmes were typically developed within academic Faculties in order to optimise existing programming and course offerings. The Faculty of Continuing Education

(CE) offered alternate delivery options of existing courses from academic Faculties. As a result, the CE Faculty was not typically involved with degree development processes. An exception is the process involved with the development of the retail management degree programme.

The next section presents discussions of the normative influences that applied to the innovative development of a Canadian retail management degree. Specifically, the section addresses how US and UK degrees and corporate universities influenced the collaborative nature of the degree development practice.

1.3 Normative Influences on Canadian Retail Management Degree Development

Because there had been no Canadian retail management education programmes, Canadian retailers historically recruited qualified managers from the US and the UK (Burns and Rayman, 1995). The retail industries in those countries have drawn upon degree programmes to provide education and credentials for potential managers (Mayer, 1989), and consequently the programmes provided normative influences for the development of Canada's first retail management degree programme (TRSRM Periodic Program Review, 2009).

Several influences shaped the development of retail management degrees in the US and UK since World War II, when the industry in both countries experienced a surge in consumer spending and developed suburban-based retail formats. The resulting degree programmes provided normative influences about curricular structures and collaborations with industry.

a) Normative Influences of US Retail Management Education: During the 1950s, US retail management education was directed at careers for retail buyers at downtown department stores (Mayer, 1989; Hollander, 1982). Colleges and universities taught retailing in marketing courses and some included retail-specific courses, like retail merchandising. The perspective was that of the department store or small entrepreneur and the courses were descriptive and 'how to' in nature (Mayer, 1989).

During the 1960s, US retail management programmes became broader in scope, more quantitative and analytical and less applied. Retailers, however, still needed graduates with applied skills; food and mass merchandise chains only required high school graduates and the department stores were not offering competitive salaries to university graduates in comparison to other sectors. The 1970s saw the emergence of US academic retail centres and the discipline adopted a focus on measurement, analyses, and behavioural content (Mayer, 1989).

By the end of the 1980s, there was more expansion of retail programmes and development of retail centres. Academic curricula merged education and practice by including experiential learning and cooperative activities (i.e. expert speaker programmes). In the 1980s, the emphasis of US retail management programmes evolved and programmes focused on strategic management and marketing.

The resulting curricular structures of US undergraduate degrees constituted normative influences on the development of the Canadian degree curriculum in terms of content and delivery mechanisms. The UK also provided normative influences,

particularly in terms of collaborative degree development with industry (Longhurst, 2010).

b) Normative Influences of UK Retail Management Education: Retailing as an academic area in the UK gained momentum during the 1980s, and related research was generally embedded in the geography and marketing disciplines (Alexander, 2001). The Institute for Retail Studies at the University of Stirling was established in 1983 as a centre for academic excellence in research and management development and for geography and marketing researchers interested in retail issues.

Many UK educational institutions have offered undergraduate and postgraduate programmes in Retail Management. In addition, retailers have engaged in partnerships with universities with the goal of developing retail management skills (Gambin et al., 2012). For example, Glasgow Caledonian University established the British School of Fashion, providing retail graduate programming that integrated industry input through an innovative teaching structure featuring industry leaders as honorary professors.

University-industry partnerships have also resulted in innovative undergraduate degree programmes based on industry input and curricular participation. In 2000, the UK government launched Foundation degrees, and decreed that these degrees should be developed and delivered through collaborations between universities, employers (i.e. retailers), colleges and Sector Skills Councils (Longhurst, 2010; Harvey, 2009). Although Foundation degrees were not established until after the time frame of this study's case, they were developed in response to the National

Committee of Inquiry into Higher Education report in 1997 (also known as the Dearing Report). This Report made recommendations for expanding higher education opportunities through partnerships with business and industry (Longhurst, 2010).

Foundation degrees feature close collaboration between employers and programme providers and ensure the integration of academic and work-based learning. The degrees provide an alternative to bachelor's degrees, and opportunities to progress to a bachelor's degree with a further year of study. They often feature innovative delivery mechanisms. An example of innovative degree delivery is the Foundation Degree in Retail Management offered through the Open University and available through distance education.

This type of innovative degree format provided normative influences for the Canadian degree development experience. The nature of the curriculum and industry partnerships provided referent examples of potential curricular frameworks and collaborative practices with the retail sector.

Another approach to university collaborations, taken by specific corporations was to create corporate universities. Corporate universities are strategic partnerships initiated by corporations to foster their specific organisational learning needs (Meister, 1998). Corporate universities developed during the 1980s to fill a void between the demands of industry and the supply of management education provided by the public university sector (Blass, 2005; Prince and Stewart, 2000; Meister, 1998).

Collaborations were core to the development of corporate universities (Prince and Stewart, 2002). In particular, the development of these partnerships was characterised by four elements; they 1) developed a shared vision; 2) selected criteria

to serve as ground rules for the alliance; 3) created a business plan; and 4) defined a pilot partnership offering/activity (Meister, 1998, pp. 182-186). The nature of the resulting collaborations provided normative influences for the inception phase of the Canadian degree's development which was constituted by a corporate university partnership.

These normative influences provided references for the processes involved with the degree development practice. The following section discusses the cultural-cognitive influences on the degree development processes. In particular, these influences arose from the ways that retail management was perceived to be a legitimate, professional career.

1.4 Cultural-Cognitive Influences on Canadian Retail Management Degree Development

Given that this study examines the institutionalisation of the development of a retail management degree, the legitimacy of such a credential is central to the process. Perceptions about retail management degrees are linked to perceptions about their career value and about the professionalism of retail management careers (Mobley, 2004).

Perceptions of the professionalism of occupations define their legitimation (Muzio et al., 2013; Scott, 2001; Reed, 1996) and occupations can enhance perceptions of professionalism by raising educational standards for practitioners (Thakor and Kumar, 2000). These professionalising and legitimating influences are central to this study's examination of degree development practices. The professionalism of occupations is

characterised by three prevalent dimensions: a) the establishment of jurisdictional claims, b) a body of knowledge to guide practice, and c) educational requirements for practitioners (Abbott, 1988; Larson, 1977; Wilensky, 1964). The following sections provide discussions of the influences of these characteristics.

1.4.1 Professionalising Dimensions: Jurisdictional Claims

Perceptions about an occupation's professionalism are related to its jurisdictional claims which includes claims about membership and occupational requirements – i.e. who can participate and what they can do (Arndt and Bigelow, 2005).

In terms of retail management, the occupation has been affected by the non-exclusive, ubiquitous nature of its jurisdiction and membership (Bernhardt, 1999).

The jurisdictional boundaries of the retail management occupation have been amorphous, and have not been conducive to cohesion amongst members (Garud et al., 2002; Bernhardt, 1999). People manage retail operations regardless of whether they have related knowledge or education. Entrants to the workforce have regarded retailing as a source of entry-level management positions, work experience and training, and they do not necessarily view retail management as a full-time career. Many use the acquired management skills to move to more career-oriented work, either in retailing or in other sectors (Bernhardt, 1999). As a result, the occupational requirements, membership conditions and related jurisdictional boundaries for retail management are ambiguous.

Occupations' jurisdictional claims are related to perceptions about social and economic dimensions of related labour markets. The social aspects of the labour

markets related to the jurisdiction of the retail management occupation are discussed in the following section.

1.4.1.1 Social Aspects of the Retail Management Occupational Jurisdiction

Various social aspects of labour markets influence perceptions about whether retail management is a legitimate career, and thereby worthy of a professionalising degree programme. These aspects are related to human resource dimensions of the career and include social perceptions about career image, recruitment and retention, and career development.

Perceptions about the professional image of retail management careers have been ambiguous (Sparks, 1992). Retail management has been characterised as a poor career choice, rife with related labour issues with recruitment and retention (Broadbridge et al., 2009, 2007; Commins and Preston, 1997; Swinyard et al., 1991). However, it has also been characterised as a worthwhile career choice in a dynamic industry. The range of descriptions has been reflected in a lack of understanding and awareness amongst potential employees about what to expect from a retail management career (Commins and Preston, 1997). Likewise, the descriptions reflect confusion amongst retailers about how to source knowledgeable/skilled employees (Hart et al., 2007), amongst educational institutions about how to prepare employees (Mobley, 2004), and amongst sectoral associations about how to market and position career opportunities (Retail Council of Canada, 2009).

Studies have identified that there are prevalent negative perceptions about retail management careers. In particular, they report perceptions related to limited

opportunities for career progression (especially for women) (Broadbridge, 2007; Brockbank and Airey, 1994); long, flexible working hours (Whysall et al., 2007; Swinyard et al., 1991); poor pay rates (Rhoads et al., 2002; Swinyard et al., 1991); non-stimulating work (Rhoads et al., 2002) and workplace stress (Broadbridge, 2002).

In contrast to the factors that contribute to the poor image of retail management, are the characteristics of the career that have appeal to potential managers. The appeal of retail management as a career has been linked to job satisfaction, and the appeal plays a significant role in career preferences (Broadbridge, 2003; Anderson et al., 1992; Swinyard et al., 1991). Whilst many retail companies assume that extrinsic career characteristics, like salary, are primary career motivators (Anderson et al., 1992; Houlton and Thomas 1990), Anderson et al. (1992) identified that intrinsic criteria, like work that is challenging and interesting, are more likely to determine career choice than extrinsic criteria. Research has also pointed to the appeal of the lifestyle offered by retailing's flexible scheduling and diverse environment (Broadbridge et al. 2009; Hart et al., 2007; Shim et al., 2002).

Recruitment and retention issues are related to social perceptions about retail management as a career. Retail management has often been characterised as a poor choice for a long-term, satisfying career, making it difficult for retailers to recruit quality managers. Retail employers have identified that a key issue in their recruiting efforts has been retail's poor image as a career destination (Hart et al., 2007; Hart et al., 1999). The image of the career and the related identity of retail managers has not been a professional one and retailers have been challenged to recruit experienced and potential retail managers.

The poor image of retail management as a career has been exacerbated by prevalent reports of high turnover of retail managers, resulting in prevailing retention issues (Rhoads et al., 2002). Rhoads et al. (2002) reported that retail managers are more disposed to high turnover than managers in other fields. Their study found that retail managers are less satisfied, feel less commitment and have greater intentions to leave than other managers. Peterson (2007) studied the factors that contribute to retail managers' decisions to leave. She reported that organisational support for management development influences whether managers choose to stay. In practice, support takes the form of attention to career development needs, alignment between organisational and personal goals, opportunities for professional development, and attention to work-life balance issues. Work-life balance issues have also been prevalent in retailing organisations which have been described as being results-oriented, competitive, and driven by high performance expectations (Oh and Weitz, 2008). The resulting effects on levels of stress and wellness have been identified as recruiting and retention concerns by researchers (Broadbridge, 2003; Babin and Boles, 1996).

Negative perceptions of career development and advancement opportunities have also been prevalent in retail management (Whysall et al., 2009; Broadbridge, 2003). Several studies have examined students' view of retail as a career, many of whom base their perceptions on their experiences as consumers or part-time employees (Broadbridge, 2003; Hemsley-Brown and Foskett, 1999; Houlton and Thomas, 1999). The studies have reported that students view retailing as having limited career progression (Whysall et al., 2009; Broadbridge, 2003; Brockbank and Airey, 1994),

and as being an unattractive career choice. Potential management employees, particularly young people, are attracted to career pathways with learning opportunities and their belief is that retail is not such an industry (Foresight, 2001; Swinyard et al., 1991). As a result, retailers have problems attracting highly educated people to management development programmes and positions (Merkel et al., 2006).

Economic aspects of retail management's occupational jurisdiction also influence perceptions about the career's professionalism. These aspects are highlighted in the following section.

1.4.1.2 Economic Aspects of the Retail Management Occupational Jurisdiction

The scope of the retail industry is vast and opportunities for management development and advancement have expanded. Retailing is a vibrant economic contributor and some of the largest, most innovative organisations in the world are retailers (Merkel et al., 2006). The managers in these organisations receive significant compensation and their work is increasingly sophisticated and dynamic. Retail managers are vital contributors to their communities providing significant employment and services (Levy et al., 2011; Merkel et al., 2006). Related economic aspects of retail management's occupational jurisdiction include the economic significance of the industry and changes in market conditions.

Retailing is a dynamic field, which is inherently responsive to changes in the external environment. Freathy (1997) observed that examination of retail management cannot be separated from changes that have occurred in the retail field in response to external drivers. External drivers of change in retailing have included globalisation,

competition, technology, and consumer behaviour (Levy et al., 2011; Merkel et al., 2006). Large, global firms and mass discounters dominate the retail field, resulting in an environment where cost containment is critical, competition is intense, and margins are thin (Bernhardt, 1999). Global operations are characterised by an emphasis on technology enabling supply chain efficiencies to drive competitiveness (Levy et al., 2011; Merkel et al., 2006; Bernhardt, 1999). Consumers are increasingly sophisticated and accustomed to personalised, immediate service (Hart et al., 2007). These shifts in the retail sector and the related environmental influences create challenging and dynamic management conditions.

The jurisdictional claims of the retail management occupation influence perceptions of its legitimacy, and the determination of a discrete body of knowledge also influences perceptions of occupations' legitimacy. When management occupations characterise a distinct body of knowledge to guide practice, they legitimate the occupation by setting it apart and distinguishing its knowledge (Arndt and Bigelow, 2005; Abbott, 1988; Larson, 1977). The following section highlights how a body of knowledge devoted to retail management has developed.

1.4.2 Professionalising Dimensions: A Specific Body of Knowledge

New formats, sophisticated consumer behaviour, technological advances, and global markets have driven related changes in the body of knowledge defining retail management as a career. The retail field underwent a transition in the 1980s, resulting in changes in organisational formats. Increasingly, traditional retail formats shifted to offer non-retailing services – i.e. grocery stores offering banking services. As formats shifted, so did the nature of services and occupational jurisdictions. A

critical influence was the growth of large multinational retailers who centralised their control at head office. Functions that had been within the purview of store managers were increasingly centralised under the auspices of specialised head office managers, and the body of knowledge that characterised retail management shifted to include specialised areas of expertise (Freathy, 1991).

With the advent of expanding and new formats, the scope of retailing careers and related requirements also expanded (Hart et al., 2007). Retailers engaged in all of the traditional business functions, including raising capital, researching customers, purchasing, implementing accounting and information systems, managing logistical systems, marketing, and managing employees (Levy et al., 2011; Merkel et al., 2006). Retail managers' skills around relationship building, team building, change management and knowledge management became integral requirements (Broadbridge, 2007, Merkel et al., 2006). Increasingly, retail management exhibited characteristics similar to other corporate management roles, which were, increasingly, regarded as professional, requiring higher education credentials as qualifications (Evetts, 2011, 2006; Reed and Anthony, 1992).

Whereas shifts in the discrete body of knowledge related to retail management signalled related shifts in the need for retail management education, the nature and specificity of educational requirements also provided professionalising influences. The following section discusses the influence of specific educational credentials in the legitimisation of retail management as a career.

1.4.3 Professionalising Dimensions: Specific Educational Requirements

Research shows that people who have work experience, have taken a retail course(s) (Broadbridge, 2003; Swinyard, 1991), or have received information from influential sources (i.e. academic, other experts, family) (Hart et al., 2007) recognise the legitimacy of retail management careers. Further, they recognise that there are significant opportunities for advancement in retailing careers, and that retail-specific educational programmes and credentials contribute to these advancement opportunities (Broadbridge et al., 2009; Hurst and Good, 2009).

However, evidence about the value of formal university education in the retail industry is ambiguous (Bernhardt, 1999; Hart et al., 1999). Studies report that retailers have not been confident that educational institutions adequately prepare students for retail management (Knight et al., 2006; Keech, 1998), and that graduates are not coming out of degree programmes with the skill sets industry requires (Gush, 1996; Moor, 1996). Mobley's study (2004) of US retail managers found that the majority of her respondents were dissatisfied with the understanding of retailing they received from their university education. Further, they were informed by their employers that the best way to learn about retail management was not through retail degrees but to be immersed in store environments from-the-bottom-up (Mobley, 2004).

However, the management development needs of degree graduates entering the retail sector have evolved. In 1983, Kiel suggested that management education providers should be involved with retailers regarding degree curriculum and that management education needed to be integrated within career path development and oriented to specific needs. Since then, there has been some improvement in the

relevance of educational offerings. More educational institutions are offering retail management degrees, and retailing has become a more attractive career to students (Commins and Preston, 1997). When retailers recruit managers from these programmes, their appeal and relevance is accentuated (Oh and Weitz, 2008) as it is when graduates have placement opportunities with an emphasis on competency development (Hart et al., 1999). As formal retail curriculum evolved and as managerial roles became more diverse and pressured, retail management qualifications consequently needed to be relevant to the industry (Hart et al, 2007).

Retail management education has been a primary influence on the choice of retail management as a career and the educational support provided by retail management degrees has been influential in establishing its legitimacy (Shim et al., 1999; Anderson et al., 1992). One of the most compelling arguments comes from Swinyard et al. (1991) who reported that students have a more positive view of retail management as a career if they have taken a retailing course. Retailing curricula, course objectives, and textbooks (i.e. Levy et al., 2011) which describe realistic retail management career expectations have promoted perceptions of the career's professionalism. Shim et al. (1999) reported that exposure to the realistic extrinsic aspects of retail management careers during retail management education positively affects career choice and that students should learn about the intrinsic aspects of retail management as a career, including the potential for pride in accomplishment, meeting challenges, greater responsibilities and advancement. In addition, a study by Anderson et al., (1992) identified academic sources related to degree programmes (i.e. academic and counselling staff), as being major influences on career decisions for retailing students.

The preceding section summarises cultural-cognitive influences on the development of a Canadian retail management degree. In particular, it highlights how legitimisation of the development practice is influenced by professionalising dimensions of the field, including its jurisdictional claims, distinct body of knowledge and specific educational requirements.

The field was also influenced by specific cultural-cognitive pressures related to characteristics of the Canadian retail environment. As a consumer service sector, the characteristics of the localised conditions, including the needs, preferences, and cultural characteristics of consumers, employees and employers, are primary factors governing the Canadian retail landscape (Bernhardt, 1999; Dawson, 1994). The following section discusses the particular characteristics of the Canadian retail environment that constituted legitimating cultural-cognitive influences on the development of a retail management degree.

1.4.4 Professionalising Dimensions: The Canadian Retail Management Education Field

This section addresses the evolution of the professionalising dimensions of the field including the particular nature of its a) jurisdictional claims, b) related body of knowledge and c) educational requirements.

a) *Jurisdictional Claims:* Canadian retailing has been characterised by certain jurisdictional conditions, including particular cultural, geographic, demographic and political characteristics that have affected its development (Rinehart and Zizzo, 1995).

Canada's national philosophy has been based on a 'mosaic' in which residents maintain their own cultures within their Canadian cultural identity. The philosophy is most evident in Canada's bilingual mandate, which has been maintained since Canada's inception. The maintenance of distinct cultures and a political commitment to a high immigration rate has contributed to a related need for the services of small specialty retailers and a few all-purpose department store chains (Burns and Rayman, 1995).

The majority of the Canadian population lives within two hundred miles of the US border, and the retail environment has been influenced by US retailers. Canadians have thereby become experienced cross-border shoppers and increasingly have expected similar retail service and options at home (Hernandez and Biasiotto, 2001; Burns and Rayman, 1995). In comparison to its southern neighbour, the Canadian population has been small and fragmented, making it vulnerable to US entrants and a natural deterrent to the rise of Canadian, homogeneous chain and discount stores (Hernandez and Biasiotto, 2001; Burns and Rayman, 1995).

In addition, the Canadian geography and climate have been formidable challenges to retailers. It is the third largest country in the world and the most northerly. In response to Canada's cold climate, enclosed regional malls, anchored by supermarkets and department stores have been prevalent. The majority of Canadian consumers have been concentrated in four major urban centres (i.e. Vancouver, Calgary, Toronto, Montreal), which are located across the breadth of the country. Distribution has been challenging and few retailers have been able to sustain a

national identity. In comparison, US retailers with well-developed supply chain processes have been able to establish a national Canadian presence and to capture significant market share by only locating in the four centres (Hernandez and Biasiotto, 2001).

Basic cultural differences between the Canada and the US are reflected in the types of retailing formats that have emerged in Canada (Burns and Rayman, 1995; Rinehart and Zizzo, 1995; Jones et al., 1994). The US has been oriented to a national “melting pot” philosophy, encouraging allegiance to a common culture and, thereby, providing a common focus for the ubiquitous features of chain retailers (Burns and Rayman, 1995).

Until the 1990’s, strict zoning laws were prevalent in Canada, reflecting a commitment to maintaining central business districts and slowing the spread of retail activity to outlying areas. As a result, prominent Canadian department store chains were able to maintain competitive downtown positions, and the spread of discount stores in suburban areas was restricted (Burns and Rayman, 1995).

Between 1890 and 1940, three Canadian department stores – Eaton’s, Simpson’s and the Hudson’s Bay Company - monopolised the retail market, selling to all classes of society (Belisle, 2011). The dominance of the department store format continued to have cultural and geographical resonance until the 1980s. A slow rate of suburbanisation and strict zoning laws in those suburbs also contributed to the department store chains’ dominance in downtown core locations (Burns and Rayman, 1995). The development of Canadian retailing reflects the rise of prominent

department stores, including the T. Eaton Company, which is an important actor in this study's focal case.

The late 1980's and early 1990's saw fundamental changes in the structure of Canadian retailing. Government deregulation came into play as the US-Canada Free Trade Agreement was passed, followed by NAFTA (the North American Free Trade Agreement) and the instituting of the Canadian national Goods and Services Tax (GST) (Hernandez and Biasiotto, 2001; Jones et al., 1994). As a result, access to the Canadian marketplace became easier, and the Canadian retail landscape was soon characterised by more US and global retailing options. Canadian retailers experienced a new degree of competition and level of volatility (Martin, 2010; Jones et al., 1994).

The Canadian retail sector has had significant effects on the Canadian economy, because it bridges production and consumption (Industry Canada, 2010). The retail sector has contributed over \$83.6 billion to Canada's Gross Domestic Product (GDP) and has been the single largest employer in Canada, employing almost 12% of the population (Industry Canada, 2013). However, Canadian retail management has also been referred to as an "Accidental Career", and viewed as employment for those with few career options or for those waiting to start their 'real' career (Retail Council of Canada, 2009). In addition turnover rates are higher in the Canadian retail sector than in any other sector (Retail Council of Canada, 2009).

b) Body of Knowledge: The body of knowledge that characterises the work of retail managers has been concentrated in the management development programmes of

the major department stores and in the experiences of individual entrepreneurs (Belisle, 2011; Burns and Rayman, 1995). In addition, Canadian economic geographers (Hernandez and Battioso, 2001; Jones et al., 1994) have provided a body of research examining competitive environments and organisational responses in Canadian retailing.

c) *Educational Requirements:* Prior to the 1990s, Canadian retailers tended to hire “professional” retail managers from the UK and US; both countries had university programmes educating retail managers and Canada did not (Burns and Rayman, 1995). Thus, Canadian managers generally have lower education levels than US managers and executives, and the share of Canadian retail managers with a university education has been substantially lower than the average from all occupations (Martin, 2010; Retail Council of Canada, 2009).

Predominant influences on the Canadian retail management education field have been the prominence of a few Canadian department store chains, the influence of US retail expansion, and a dearth of Canadian retail management education. This study focuses on a case that exhibits all of these characteristics and its origins are described in the following section, providing a description of the corporate and university partners that originated Canada’s first degree in retail management.

1.5 A Description of the Case Study: The Development of Canada's Retail Management Degree

*"In the beginning there was Timothy Eaton.
– Cover of Financial Post magazine, 1978"*

The T. Eaton Company of Toronto became a department store in 1890, and by 1940 it was the world's eighth largest retailer (Belisle, 2011). Eaton's was part of Canadian life; the downtown of every Canadian urban centre was dominated by the Eaton's Store. The Eaton's mail-order catalogue was distributed throughout the widespread, Canadian landscape, providing all regions access to ubiquitous goods and services.

The Eaton's legacy included a distinct employee culture. Generations of Eaton's employees proudly refer to themselves as "Eatonians." (including the author's mother) and their employment was characterised by a paternalistic tone and an understanding that they had a job for life (Belisle, 2011; McQueen, 1999). Timothy Eaton laid the groundwork with a shorter workday, closing his store at 8 p.m. -- two hours earlier than his competitors. The Eaton family was referred to as the "royal family" (McQueen, 1999) and they provided employees with housing, private hospitals and exclusive summer camps.

Eaton's was the centre of the Canadian retail field, which became increasingly fragmented with the advent of deregulation and urban sprawl. By the 1990s, American retailers expanded into Canada, and Eaton's found it increasingly difficult to compete.

In 1993, Eaton's undertook a search for an academic partner to work with them to provide university education for their managers, and this was also the first year that

Walmart operated in Canada. Eaton's foresaw that Canadian retail management would need to be more competitive and professionalised in order to thrive in an environment increasingly populated with US retailers. The vision for the partnership, named the Eaton School of Retailing (ESR), was that the university programming would eventually be available for retailers across Canada. Eaton's conducted extensive benchmarking of corporate university partnerships to inform their search. They focused their efforts on Ryerson University and the ESR became a partnership via a one-page document in 1993.

Ryerson Polytechnic Institute of Technology was formed in 1948. In the early 1950s, it offered a programme in Merchandise Administration, becoming an early source of retail management education. The programme was discontinued in the 1960s when the province of Ontario instituted Colleges of Applied Arts and Technology (CAATs). These colleges were given the mandate to deliver vocational education programmes, including those related to merchandise administration. There were, however, no CAAT programmes specifically devoted to Retail Management education. In 1963, the Institute became Ryerson Polytechnic University, and in 1993, it was granted full university status, becoming Ryerson University.

In 1992, the Ontario Retail Sector Strategy Advisory Board (under the auspices of the Ontario provincial government) identified the need for retail professional development and training programmes. Ryerson University received a \$2.1 million grant to develop programming.

The partnership with the ESR provided the vehicle for developing further programming. In addition, in 1994 over fifty organisations and individuals from across the retail sector made a \$2.1 million endowment to establish the Eaton Chair in Retailing (CSCA, 2013), thereby creating, for the first time, a Canadian university research centre in retailing.

Identifying itself as a corporate university programme, the ESR developed intensive (i.e. week-long) pilot offerings of Ryerson credit courses to Eaton's employees across Canada. The courses were redeveloped so they presented a retail-focused version of the credit courses.

Although university education in Canada is under the jurisdiction of provincial governments, the federal government regarded the retail industry as an important sector underserved by higher education. ESR received funding from the federal government to subsidise the development and delivery of the courses. The ESR partnership was thereby expanded to become an interorganisational collaboration including representatives from the federal government, industry associations (i.e. the Retail Council of Canada) and other retailers.

As the pilot courses proved successful with the Eaton's students, further funding was sought from the federal and provincial governments to further the development of a programme of courses to a broader, national population, including delivery through distance education. The emerging certificate programme was named the Canadian Retail Management Education Program (CRMEP). The development of the CRMEP

necessitated a new interorganisational collaboration to produce the documentation required for the development process.

The CRMEP conducted an industry needs assessment in 1997 and a comparator evaluation of degree programmes in the US and UK (TRSRM periodic program review, 2008). The comparison identified a disparity between academic qualifications among executives in the American and Canadian retail industries and claimed that there was a need for university education at all levels of management in Canada. In addition, there were requirements identified for lifelong learning options (courses and/or certifications). In order to respond to these needs and related funding opportunities, collaborations were formed to produce the documentation required (i.e. the Industrial Adjustment Services Initiative in Retail Management Education (IAS), National Sector Adjustment Services (NSAS)).

Based on a proposal to the Ryerson Senate, citing the retail sector's educational needs identified in the CRMEP, IAS, and NSAS documents, and integrating the CRMEP courses, Ryerson approved Canada's first Bachelor of Commerce degree in retail management in 1999 (TRSRM Periodic Program Review, 2008). In 1999, the ESR had evolved into Canada's first degree in Retail Management at Ryerson University. That same year, the T. Eaton Company filed for bankruptcy after operating for 130 years.

1.6 Chapter One Summary

Prior to the development of the ESR, the Canadian retail management education field was amorphous. However, the Canadian retail sector was subject to dynamic

changes in its environment, which precipitated the development of university-level programming devoted to retail management. The resulting degree development processes constituted the institutionalisation of retail management education.

This chapter provides a discussion of the institutional pressures which influenced the evolution of the nascent retail management education field and of its constituting degree development processes. Regulative pressures influenced the processes related to Canadian universities' partnerships with industries and corporations, and to the development of new degrees. Normative pressures influenced how curricular structures and industry collaborations were formed. Retail management education in the US and UK were significant normative influences, as were corporate universities. The field was also influenced by cultural-cognitive pressures from within the retail sector about whether the retail management occupation was professional enough to warrant a sector-specific degree and consequently, whether the sector would assimilate the career value of a sector-specific degree. In particular, the Canadian retail sector provided cultural influences which have affected how the Canadian retail management education field has evolved, and which are related to the innovative processes involved with the development of a degree devoted to Canada's amorphous retail sector.

The discursive processes used by Eaton's, Ryerson, and the other members of the interorganisational collaborations associated with the degree's development are the basis for the case studied in this thesis. The case is a unique story. Thoroughly documented, it provides the basis for this study's analysis of the development processes constituting an innovative degree development practice. This study

thereby answers questions about how interorganisational collaborations and discursive institutional work constitute the legitimating dimensions of a practice.

The next chapter provides a discussion of literature relating to discursive institutionalisation. Through the discussion, gaps in extant research are identified, and the Chapter culminates with a determination of the study's objectives, and its conceptual framework, which are oriented to providing answers for the study's focal research question.

Chapter 2: Literature Review: Institutionalisation of New Practices Through Collaborative and Discursive Work

2.1 Introduction

The purpose of Chapter Two is to develop this study's conceptual framework and to establish its overarching research question. The underpinnings for the framework are found in institutional theory and, ultimately, the framework provides a multi-dimensional model which can be used to explain the process of institutionalising a new practice of degree development. Consequently, this Chapter provides an investigation of the literature related to institutionalisation processes.

The purpose of this investigation is to assess how and to what extent studies of institutionalisation address the nature of the collaborative, discursive institutional work done in the development of innovative institutional practices. This study will claim that the processes involved with development of a new practice constitute a process of institutionalisation. Furthermore, this thesis will argue that the institutionalisation of a new practice is constituted by collaborative and discursive processes, which bring about the legitimisation critical to institutionalisation.

This Chapter begins with a discussion of literature related to the theoretical foundations of the study of institutionalism, underscoring the interplay between institutionalising processes and structuration. The next section presents a discussion of how institutional explanations portray the characteristics of fields and how the agency of embedded actors constitutes strategic action fields. This section also highlights the nature of collaborative agency, particularly focusing on university-industry collaborations. The Chapter then progresses to an examination of the

relationship between institutionalisation, innovation and change, with an emphasis on the interplay of institutionalisation and the work performed to develop institutional practices (i.e. practice work). It then bridges to a discussion of institutional work theory, including an evaluation of related empirical studies, followed by a review of research that addresses how institutionalisation is performed through discursive work. The relationships between legitimation, professionalisation, credentialism, and field boundary work are then discussed. Finally, there is a review of research assessing institutional issues in the context of both retail management and management education.

The Chapter concludes with a discussion of the gaps and research objectives that have been identified through the review of the literature, culminating in the research question that guides the study and the conceptual framework that underpins the analytic process.

2.2 Theoretical Foundations of Institutionalisation

This section provides a discussion of the theoretical foundations for the development of this study's resulting conceptual framework. The thesis looks to the foundations of institutional theory as a starting point for developing an approach to analysing an institutionalisation process. There are two aspects of institutions that are prevalent in institutional theories: a) that institutions have a rule-like factual quality, and b) that institutions are embedded in formal structures. These two aspects are discussed in the following sections.

a) *Institutions' Rule-like, Factual Quality*: Institutions are prevailing features of social life (Giddens, 1984), which are generally accepted, resistant to change, and have a rule-like, factual quality (Scott, 2001; Jepperson, 1991). When individuals or groups interact, they establish beliefs about each other's actions, and eventually the beliefs become entrenched in reciprocal roles, which are then accepted as appropriate and expected (referred to as typifications) (Barley and Tolbert, 1997; Zucker, 1977; Berger and Luckmann, 1967). The resulting patterns of belief acquire the status of taken-for-granted facts which shape future interactions (Barley and Tolbert, 1997).

According to Scott (2001), institutions are constituted by three modes of support and action. He refers to these modes of action as three dimensions or pillars of institutions and this study will examine how discursive institutional work develops three pillars of a new institutional practice. The three pillars are:

a) regulative dimensions which guide action through coercion and establish rules to regulate behaviour. These rules and regulations are enforced by interacting parties or outside enforcing parties (i.e. the state).

b) normative dimensions which guide action through norms that prescribe, evaluate, and oblige behaviour. These dimensions can include roles, role expectations and obligations.

c) cultural—cognitive dimensions which guide action through categories and create shared conceptions to frame how meaning is made. These dimensions emphasise templates over roles and obligations.

Scott (2001) emphasises that the pillars do not work in isolation and as a conceptual schema, his model presents a way to view the interactions of the actions and

processes involved with institutionalisation, and particularly, the development of new institutional practices (Scott, 2001).

b) Institutions Embedded in Structures: Scott (2001, p. 49) defines institutions as “multifaceted, durable social structures made up of symbolic elements, social activities, and material resources”. His definition therefore portrays institutions as social structures which can emerge from and also determine the actions and agency of different actors. These structures are defined as “the set of rules and resources instantiated in recurrent social practice.” (Orlikowski, 2000, p. 406) and the notion of agency refers to actors’ capacity to change practices (DiMaggio, 1988). Furthermore, different actors have different agentic abilities and may respond differently to institutional influences.

Scott’s (2001) definition is aligned with sociological perspectives that argue that structure and agency are complementary concepts – i.e. that structures influence behaviours and actors’ behaviours influence how social structures are constituted (Giddens, 1979; Bourdieu, 1977; Berger and Luckmann, 1967). The complementary nature of structure and agency is core to this study’s examination of the development of a new institutional practice, because the actions of agentic actors are considered to simultaneously influence and be influenced by the development of institutional structures.

Institutionalisation is the process by which institutions are created (Tolbert and Zucker, 1994; Jepperson, 1991). Studies of institutionalisation focus on the sites of social action and interaction and therefore, they examine the links between agency,

action and structure (Scott, 2001). The following section reviews how research has examined and theorised about processes of institutionalisation.

2.3 Processes of Institutionalisation

Investigations of institutionalisation processes describe them from a number of different approaches (Scott 1987). The following section highlights approaches that feature how institutionalisation processes a) instill value and create reality, b) are influenced by cultural and contextual influences, and c) occur at different levels of analysis.

a) *Institutionalisation – Instilling Value and Creating Reality*: Early in the development of institutional studies was Selznick's (1948) work about how structures have value which evolves in relation to their historical, holistic context. He conceptualises that by instilling value, institutionalisation promotes stability of organisational structures. Although this conception provides support for the influence of geographic, historical contexts on institutionalisation, the emphasis of his conceptualisation is definitive, rather than explanatory (Scott, 1987), and therefore it does not provide an approach for examining process development.

Institutionalisation is also viewed as processes of creating the accepted, pervasive social beliefs that constitute social reality. These beliefs embed meaning in social reality and are socially constructed through a process where associated social processes become routine and generally accepted as the way things are done (Berger and Luckmann, 1966). Meyer and Rowan (1977) expand Berger and Luckmann's (1966) conception of institutionalism, adding that "Institutionalization

involves the processes by which social processes, obligations, or actualities come to take on a rule-like status in social thought and action.” (p.341). However, although these definitions provide general depictions of institutionalisation processes, they do not provide explanations of how social realities occur or are accepted as organisational structures.

b) Institutionalisation – Cultural and Contextual Influences: The work of Meyer and Rowan (1977) argues that organisational structures are not only related to institutionalising processes, but also to acceptance of shared meanings of social reality, and to taken-for-granted beliefs about their legitimacy. They contend that institutionalised structures (i.e. like degree development processes) can have symbolic properties that are not necessarily related to efficiencies (Tolbert and Zucker, 1994), and therefore can be affected by cultural elements like symbols, cognitive systems, and normative beliefs (Scott, 1987). This new orientation to institutionalisation proposes that formal organisational structures are shaped by broad institutional forces within a field, and thereby provides an explanation of how institutional realities occur and are accepted. Furthermore, new (or neo-) institutionalism focuses on the homogeneity of organisational practices and claims that organisations conform to widespread social beliefs, which are referred to as rationalised myths. These beliefs are adopted to gain legitimacy in the institutional environment (DiMaggio and Powell, 1991, 1983). As a result, institutionalisation is linked to various cultural benefits (i.e. increased legitimacy) and, the process can vary according to institutional environments (Scott, 1987; DiMaggio and Powell, 1983). Neo-institutional theorists argue that the institutional context provides norms that produce regularised organisational behaviours (DiMaggio and Powell, 1991; Meyer et

al., 1983; Meyer and Rowan, 1977). As a result, organisations respond to institutional contextual pressures by adopting homogeneous forms or organising templates (DiMaggio and Powell, 1983).

The work of DiMaggio and Powell (1983) examines how processes lead to conformity with different institutionalised norms. They provide an explanation of the tendency for different organisations to have similar structures, which is a process referred to as isomorphism. Isomorphism occurs in three ways: a) coercive isomorphism, which arises from a legal/regulatory environment, b) mimetic isomorphism which occurs when organisations model themselves on other successful organisations; and c) normative isomorphism which stems from professionalisation (DiMaggio and Powell, 1983). These isomorphic processes result in organisations adopting structures and practices which are consistent with their external institutional environment (DiMaggio and Powell 1983; Meyer and Rowan 1977). However, the concept of isomorphism depicts institutionalisation as being inherently constrained by extant beliefs and therefore does not provide an explanation of how innovative structures evolve.

Related to the examination of cultural and contextual influences on institutionalisation, is the conceptualisation of how types of beliefs are institutionalised for different purposes (Friedland and Alford, 1987). Cognitive and normative systems, like family, religion and state systems persist in all societies and institutional researchers refer to the systems as institutional logics (Thornton, 2004; Friedland and Alford, 1991). In her examination of institutional logics, Thornton (2004) identifies corporations, professions, families, religions, and states as the primary institutional logics.

In particular, institutional logic research examines how exogenous (i.e., outside the organisation) influences affect the concept of occupational identity. For example, the work by Rao et al., (2003) examines the reorientation of French chefs' identity by relating the process to a shift in the underlying logics associated with the nature of cuisine. When the restaurant market and related media embraced nouvelle cuisine, chefs' identities became aligned with the new definition of cuisine. Although institutional logic explanations contribute to understanding shifts in cultural influences, they are suited to overarching rationales for exogenous-influenced change and are not oriented to granular examinations of institutionalisation processes, which include an interplay of exogenous and endogenous (i.e., coming from the internal environment) influences.

By incorporating the role of cultural elements, institutionalisation is also linked to sociological work examining organisational culture, and particularly, to Bourdieu's (1984) notions of fields and habitus. The social and economic contexts in which people's practices occur are referred to as fields by Bourdieu (1984). Fields are constituted by the various agents who participate in them and produce certain discourses and activities related to the beliefs and actions of their constituents (DiMaggio and Powell, 1983).

Bourdieu's (1984) notion of habitus refers to actors' values and deeply embedded dispositions arising from their backgrounds. Although actors may have different responses to situations, their responses are directly affected by cultural histories, which are intrinsically linked to their geographic communities. His conceptualisation

thereby allows for the integration of both exogenous and endogenous influences on the formation of beliefs.

Studies of institutionalisation processes have also focused on different levels of analysis, and these levels are outlined in the next section.

c) Institutionalisation: Levels of Analysis: The influence of institutions can be felt at different levels, including the societal, field, and organisational levels (Bourdieu, 1977). Scott (2008) notes that studies of institutionalisation occur on three analytic levels: the macro-level, wherein the focus is on institutional effects at a macro-societal level (Hardy and Maguire, 2010; Maguire and Hardy, 2006; Creed et al., 2002), the meso- or field-level, wherein the focus is on a particular field of activity (i.e., an industry sector or a profession) (Cooney, 2012; Bartlett et al., 2007; Lounsbury, 2007) and at the micro- or organisational level, wherein the focus is on institutional effects on individual organisations (Empson et al., 2013; Lounsbury, 2001). This study is focused on a meso-level examination of the Canadian retail management education field, rather than a meta-level which would focus on multi-national organisational research (Kostova et al., 2008; Davis and Marquis, 2005). The meso-level field focus is in keeping with previous findings that institutional work is most likely to occur at the meso-level (Fligstein and McAdam, 2011), and therefore, this analysis is best suited to the meso/field-level of analysis.

The following section discusses the nature of a field level of analysis. The section presents an analysis of research focusing on the importance of issues and field characteristics in field formation. The section then presents a discussion of the theory

of strategic action fields, which provides a way of conceptualising an emergent, change-oriented field perspective.

2.4 Fields and Institutionalisation

DiMaggio and Powell define fields as "sets of organizations that, in the aggregate, constitute an area of institutional life; key suppliers, resource and product consumers, regulatory agencies, and other organizations that produce similar services or products." (1983, pp. 148-149). Therefore, organisational fields reflect a meso level of analysis situated between individual organisations and society as a whole (Greenwood et al., 2009; Greenwood et al., 2002). These fields include actors that "interact more frequently and fatefully with one another than with actors outside the field" (Scott, 1995, p. 208). Furthermore, Martin (2003) describes how field-level institutions are the patterns of interaction between organisational communities which are defined by shared systems of meaning, which establish the boundaries of communities of organisations, and which define appropriate behaviour, membership, and relationships. Institutional research looks to the concept of field as an appropriate level of analysis to explain change and the transformation of organisational practice (Greenwood et al., 2011).

The notion of organisational fields is useful for examining how retail management education developed as a discrete field and how the constituting organisations interacted in the common enterprise of degree development. The following section provides a discussion of research that provides structural explanations for the development of fields.

2.4.1 Field Development

Previous research on organisational fields has provided structural explanations for the processes of development. These explanations suggest that development is contingent upon the nature of the field itself (Greenwood et al., 2011; Purdy and Gray, 2009). The following section analyses research related to influences on development, including a) focal issues and b) field characteristics (Greenwood and Hinings, 1996).

a) Field Developmental Influences- Focal Issues: Researchers identify the importance of focal issue(s) in field development (Jones, 2001; Leblebici et al., 1991). For example, the works of Bourdieu (1977) and Bourdieu and Wacquant (1992) conceptualise that fields are arenas where actors compete for capital in order to define the legitimacy of particular galvanising issues. Hoffman (1999) also argues that common issues have formative roles in organisational fields, and that the issues bring together actors regardless of their diverse interests.

Of particular interest to this research is Trank and Rynes' (2003) study of business management education, which identifies business education as an organisational field and argues that the disparate members of the field were affected by the common issues of reduced public support and increased demand for higher education (Slaughter and Leslie, 1997). Likewise, this current study will view retail management education as an organisational field and will also consider the ways that disparate actors in the field converge around issues like reduced university funding and increased foreign retail competition – (see Section 1.4.4).

b) Field Developmental Influences - Field Characteristics: Researchers have studied the developmental influences of the characteristics of fields, according to dimensions of fragmentation, centralisation, and structuration (Greenwood et al., 2011; Martin, 2003). Fragmentation refers to the level of exclusive jurisdiction a field has over its domain, which is reflected in the delineation of its boundaries, membership and rules (Fligstein and McAdam, 2011; Garud et al., 2002; Hoffman, 1999). For example, membership in non-fragmented fields may include stringent institutional requirements such as specific educational credentials (Greenwood et al., 2011).

In comparison, fragmented fields tend to exhibit non-exclusive jurisdictional boundaries, with few requirements for membership (Rao et al., 2000). The Canadian retail management field is an example of a fragmented consumer service field, as its jurisdictional boundaries are non-exclusive (Bernhardt, 1999) and consumers and suppliers are disorganised and have little influence (Rao et al., 2000; Powell, 1991).

Centralisation is related to the tendency of the field to have some sort of hierarchy of the organisational members. For example, more central organisations are distinguished by their enhanced status (Podolny, 1993), resources, or size in relation to other organisations in the field (Martin, 2003). Research about the effect of the centralised nature of organisations on their agency is multi-faceted (Battilana and D'Aunno, 2009; Leblebici et al., 1991). For example, more centralised organisations (i.e. high status/large size) may be constrained by institutional pressures (Ahmadjian and Robinson, 2001) which may not contribute to their agency (Greenwood et al., 2011), or they may also have greater discretion about how they respond (Greenwood

and Suddaby, 2006; Kostova et al., 2008). Research also identifies the propensity for peripheral (Leblebici et al., 1991), new (Thornton, 2004) and boundary-spanning (i.e. bridging multiple fields) (Hargrave and Van de Ven, 2006) organisations to deviate from institutionalised practices (Battilana and D'Aunno, 2009; Seo and Creed, 2002). These findings contribute to a broad understanding about the heterogeneous nature of organisations' centrality in institutionalisation and their resulting agency within the fields in which they are embedded. However, the findings also show that not all organisations that are similarly located within a field are equals in their agentic tendencies, and that there are other conditions that contribute to agency (Battilana and D'Aunno, 2009).

Structuration refers to the process of gradual maturity and specification of field characteristics (Greenwood et al., 2002). DiMaggio and Powell (1983) describe how this process of structuration has four parts: 1) increased interaction between organisations in a field, 2) defined structures of hierarchy and patterns of coalition, 3) increased information loads, and 4) mutual awareness of common purpose. The structuration of mature fields is characterised by regular interorganisational relationships within the field, articulated institutional infrastructures, and well-established hierarchies, including distinguishable central actors (Wooten and Hoffman, 2008; Maguire et al., 2004). Scholars have looked at the processes that develop and characterise mature fields, including theorisation processes that justify arrangements (Maguire et al., 2004; Greenwood et al., 2002), and mechanisms of enforcement including loss of accreditation and/or withdrawal of legitimacy (Greenwood et al., 2002).

On the other hand, studies of relatively unstructured or emergent fields highlight the uncertainty inherent in their institutional arrangements, noting that the rules defining legitimate activities, membership, and boundaries are ambiguous or permeable, and are not widely understood or change over time (Fligstein and McAdam, 2011; Garud and Karnoe, 2003; Trank and Rynes, 2003). For example, ambiguous boundaries are evident in the management occupation field because employment, remuneration, status and authority are organisationally dependent, and the field has limited control over a discrete knowledge base (Khurana and Nohria, 2008; Trank and Rynes, 2003). As a result, managerial practices are highly diverse, the related knowledge base is amorphous, and the structure of managerial education is contentious (Khurana and Nohria, 2008; Mintzberg, 2005; Trank and Rynes, 2003).

Management roles in consumer service organisations reflect the conditions of a fragmented service class (Trank and Rynes, 2003). Likewise, although the retail management field has a deep history, it is an emergent field with ambiguous patterns of membership and boundaries (Bernhardt, 1999; Hoffman, 1999), as is the related field of retail management education, which will be the focal field for this study.

The structuration of institutional fields is also related to the geographic communities in which institutions are embedded (Marquis et al., 2013; Lounsbury, 2007), and therefore the geographical setting of the Canadian retail management education field is related to the structuration of degree development. Researchers have found that there may be significant differences in institutional norms between geographical communities (Marquis et al., 2013; Marquis and Battilana, 2009). Local institutional norms correspond to “the populations, organizations, and markets located in a

geographic territory and sharing, as a result of their common location, elements of local culture, norms, identity, and laws” (Marquis and Battilana, 2009, p. 286). This geographically-situated conceptualisation and level of analysis is pertinent to the examination of the legitimating influences and actions of localised actors. By analysing the localised Canadian retail management education field, this study is aligned with the theory of strategic action fields, which emphasises an orientation to the historical, geographic community. The theory of strategic action fields is discussed in the following section.

2.4.2 Strategic Action Fields

The level of analysis of the theory of strategic action fields is the meso-level where knowledgeable actors interact with common understandings about the field’s purposes, relationships and rules (Fligstein and McAdam, 2012, 2011). The theory integrates the social constructionist view of the formation of taken-for-granted and shared views of reality in fields (Jepperson, 1991) with a focus on field processes that are influenced by actors with different advantages, like centrality or abundant resources (Fligstein and McAdam, 2012, 2011; Bourdieu and Wacquant, 1992).

Fligstein and McAdam (2012) use the example of US colleges and universities to make the argument that the educational institutions as a whole do not constitute strategic action fields. Rather, there are subsets (i.e. business schools) that see themselves as comparator organisations and the subsets are strategic action fields where there is continuous flux in membership dynamics. In a related way, their theory argues that changes in the actors’ positions within fields is inherently possible, in comparison to institutional approaches that suggest that changes are constrained

by expectations of common, taken-for-granted behaviour (DiMaggio and Powell, 1983).

The theory of strategic action fields has been used as a theoretical lens for studies of emergent fields including US and UK socially motivated business enterprises (Cooney, 2012), the Dutch sustainable tourism movement (Van Wijk et al., 2013), and the Turkish gold mining field (Özen and Özen, 2011). It is particularly relevant to emergent fields, like retail management education, where constitutive institutional rules and boundaries are ambiguous (Greenwood et al., 2011).

The theory conceptualises three change mechanisms (coined contentions by the theory) that characterise its foci on social construction and strategic agency: 1) at least one actor identifies a change in the field or external environment as threatening or providing a worthwhile opportunity for the field; 2) the actors identifying the threat/opportunity have the resources to mobilise action; and 3) the actors violate field rules of acceptable practice and engage in innovative action (Fligstein and McAdam, 2012, 2011).

These mechanisms are useful for analysing the influences of local conditions and the nature of agentic actors in performing innovative actions. Studies have used the theory to examine constitutive legal forms (Cooney, 2012), the dynamics of overlapping fields (Van Wijk et al., 2013), and the strategic challenges of actors trying to structure a field (Özen and Özen, 2011).

In particular, Cooney's (2012) analysis of early institutionalisation efforts in the US and the UK reinforces the notion that there are differing influences of localised conditions in geographically situated strategic action fields. The studies of Van Wijk et al. (2013) and Özen and Özen (2011) both elucidate how local conditions influence how collaborative work between social movements (i.e., labelled challengers) and embedded actors (i.e., labelled incumbents) contributes to the development and stability of strategic action fields.

These studies claim that heterogeneous, collaborative influences from within strategic action fields contribute to institutionalisation processes. They also provide support for Fligstein and McAdam's (2012, 2011) assertion that social, collaborative skills are integral to institutional development. However, there have not been studies which utilise a strategic action field framework for analysing the particular facets of an emergent field which is constituted by institutionalised actors and corporate embedded actors from a consumer service sector.

Building on the notion of collaborative influences, the strategic action field theory helps to explain how development processes are not solely geared to the role of a powerful, centralised actor. Even though the theory is oriented to explaining institutional structuration and change, it provides an approach for focusing on the role of collaborative actors and their agency within a field. The following section discusses the roles of actors and their agency within a strategic action field.

2.5 Actors and Their Agency in Institutionalisation

Battilana and D'Aunno's (2009) define agency as "engagement with the social world that, through the interplay of habit, imagination, and judgment, can both reproduce and transform an environment's structures" (Battilana and D'Aunno, 2009, p.46).

Agentic actors engage with field-level institutions which are the patterns of interaction between organisational communities, are defined by shared systems of meaning, establish the boundaries of communities of organisations, and define appropriate behaviour, membership, and relationships. Institutional research looks to the concept of field as an appropriate level of analysis to explain change and the transformation of organisational practice (Greenwood et al., 2011).

The two primary characteristics of actors with potential for agency are that they have valid and lawful interests and that they are legitimated agents with authority, responsibility, and capacity to act (Meyer and Jepperson, 2000).

The degree to which actors are embedded in their context (embeddedness) is an important concept in explaining institutional change. Embedded actors' agency is influenced by the nature of the institutional contexts in which they are situated and by their locations within the contexts (Friedland and Alford, 1991). The institutional context shapes action, but social action is not completely governed by context (Emirbayer and Mische, 1998). Agency is simultaneously constrained and enabled by the institutional context (Giddens, 1984; DiMaggio and Powell, 1983), as are the causes and reasons for actors' motivation, interests and intentions. Consequently, institutional research views embeddedness both as a constraint and as an opportunity for change, (Greenwood and Suddaby, 2006; Seo and Creed, 2002).

Specifically, studies note that embedded actors are inclined to be knowledgeable about the contextual influences of their fields (Reay et al., 2006). An example is Reay et al.'s (2006) study of the professionalisation of Nurse Practitioners in Alberta, which argues that actors purposefully use their embedded networks and knowledge when legitimising a new occupational identity. Although their study focuses on the individual (i.e. micro) level, it extends the concept central to strategic action field theory, which is that actors' social resources can be instrumental for mobilising agency. Related to this focus is the notion that individual actors can utilise their networks and knowledge to mobilise institutional change, and therefore take on an entrepreneurial role. This role is discussed in the following section.

2.5.1 Institutional Entrepreneurs

Embedded actors can take on the role of institutional entrepreneurs (Leca et al., 2008). Institutional entrepreneurs are organised actors with sufficient resources (including financial and social ones) to generate new institutions when they see worthwhile opportunities (Seo and Creed, 2002; Fligstein, 1997; Holm, 1995). These opportunities may emerge from external triggers, which propel the actions of new or present actors (Leblebici et al., 1991; Oliver, 1991) who pursue strategic interests and actions (Garud et al., 2007; Greenwood and Suddaby, 2006; DiMaggio, 1988).

Institutional entrepreneurs adopt an instrumental role as instigators of institutional change (DiMaggio, 1988) by mobilising resources (Garud et al., 2007; Battilana, 2006) and actors (Lounsbury and Crumley, 2007; Perkmann and Spicer, 2007; Suddaby and Greenwood, 2005; Zilber, 2002). New practices are tried out, and, as

they are accepted, gain legitimacy. Eventually practices become taken-for-granted, and, thereby, institutionalised (Greenwood et al., 2002; Barley and Tolbert, 1997).

Institutional entrepreneurs' social positions impact their access to resources and their perceptions of their fields (Greenwood and Suddaby, 2006; Leblebici et al., 1991; DiMaggio, 1988). Entrepreneurs often link their institutional projects to the characteristics of their particular situation or identities, creating bases for personal and moral legitimacy (Maguire et al., 2004). Drawing from their bases of resources, social position and legitimacy, entrepreneurs are able to mobilise support for institutionalisation projects. Notably, the role is associated with the development of an action focus in institutional theory (DiMaggio and Powell, 1991).

The institutional entrepreneur role is inherently heroic because it is oriented to the successful creation and institutionalisation of practices (Lounsbury and Crumley, 2007). However, the heroic nature of the institutional entrepreneur role is also detached from the influential and instrumental nature of collaborative agency (Munir et al., 2005; Maguire et al., 2004; Garud et al., 2002). The following section provides a discussion of the characteristics of collaborative agency and its influence on institutionalisation processes.

2.5.2 Collaborative Agency

This thesis draws upon the concepts of a) distributed agency and b) interorganisational collaborations to explain how collaborative actors in a strategic action field interact in an institutionalisation process.

a) *Distributed Agency*: Distributed agency asserts that no individual or group of actors is able to redefine meaning or value alone, so diverse actors work in a coordinated way, building on the interpretive work of others (Perkmann and Spicer, 2007; Garud and Karnoe, 2003). For example, in their study of French doctoral education, Dahan and Mangematin (2007) note that distributed agency suggests a way to view a diverse range of actor strategies beyond the heroic nature of the institutional entrepreneur approach. They argue that the implementation and adoption of institutions like doctoral education requirements can differ amongst diverse actors. However, whilst distributed agency presents a rationale for a collective approach to institutionalisation, it does not offer an explanation for how organisational collaborators come together. The next section highlights how interorganisational collaborations are constituted.

b) *Interorganisational Collaborations*: Interorganisational collaborations are defined as “a cooperative, interorganisational relationship in which participants rely on neither market nor hierarchical mechanisms of control to gain cooperation from each other (Lawrence et al., 2002; Phillips et al., 2000). Membership in collaborations can be emergent and/or planned (Seitanidi and Crane, 2009). Furthermore, as collaborations are formed, membership can change according to external pressures, changes within the member organisations, and shifts in the advantages produced by the collaborations (Huxham, 2003; Huxham and Vengen, 2000). These explanations address the dynamics involved with collaborations’ membership but do not provide a complete explanation of how or why collaborations have heterogeneous membership.

How the membership in collaborations is constituted can be explained by Rowley's (1997) stakeholder framework which approaches membership from the perspective of actors' position in a network of potential collaborators. In particular, he describes concepts of network centrality and density. Centrality refers to an individual actor's position in a field relative to others (Rowley, 1997) and related to their organisational power and the structure of power within the field or network. Phillips et al. (2004) assert that centrality helps to ensure that the discourses and texts created by central actors are acknowledged and consumed. Density refers to the number of relational ties between stakeholders, and how the ties improve communication and contribute to shared expectations (Rowley, 1997). Although his framework explains influences surrounding membership formation, it does not address the nature of collaborative relationships involved particularly with institutionalisation.

Phillips et al., (2000) offer an explanation of the interactions between the dynamics of collaboration and of institutionalisation. Their model argues that institutionalised rules and resources contribute to the negotiation of collaborations and that collaborations also affect the reproduction and transformation of institutional fields.

Two studies in particular, have identified dimensions of collaboration and collective identity that contribute to institutionalisation. The first study by Hardy et al. (2005) presents a theory of collaboration that focuses on the roles of collective identity and conversations. The naming of collaborative groups serves to form a collective identity (Hardy et al., 2005) and create a discursive object by which relationships and interactions can be analysed. In this thesis, the formation of collaborative groups provides a discursive position from which the group members legitimately enter into

the discourse concerning the importance of developing retail management education, thereby effectively increasing the potential influence of the collaborations beyond what they would have had as individual actors (Huxham, 2003; Gray and Hay, 1986).

Hardy et al. (2005) conceptualise how collaborations' collective identity is discursively constructed through two types of ties. The first type is generalised membership ties which involve membership in a community based on a connection with an issue (Hardy et al., 2005; Collins, 1981). The construction of the issue is instrumental in determining who has legitimate membership in the collaboration, and the discourses related to the issue need to be sensible and legitimate. For example, Hardy et al., (2005) refer to the collaboration that improved access to AIDS treatment in Canada, which drew upon generalised membership ties related to a legitimate scientific discourse in order to underpin the importance and legitimacy of their collaborative discourse (Maguire et al., 2001).

The second type of ties is particularised membership ties, in which actors are tied to each other through the issue. The ties describe roles and determine who can legitimately communicate on behalf of the collaboration. Particularised membership ties provide a structural basis for specific participants to address the issue through particular discourses (Hardy et al., 2005). Hardy et al., (2005) propose that collective identities are stronger when members are connected by generalised membership ties to common issues and by particularised membership ties connecting them directly to each other. Their study investigates the nature of these ties through the analysis of interpersonal conversations; however they also call for discursive research using

different levels and types of analysis to extend knowledge about the dynamic nature of collaborative interorganisational ties.

Lawrence et al.'s (2002) study of collaborations in a nongovernmental Palestinian organisation also provides explanations about institutionalising collaborations. Their study identifies two dimensions of collaborations, involvement and embeddedness, that are related to development processes (Lawrence et al., 2002). Involvement relates to the internal dynamics of the collaboration; there is deep interaction between participants, partnership agreements, and bilateral information flows. Embeddedness refers to the ways collaborations are focused on interorganisational relationships and includes interactions with third parties, representation arrangements, and multidirectional information flows.

Whilst both studies (i.e. Hardy et al., 2005; Lawrence et al., 2002) examine micro-level conversations that develop collaborations, they raise questions about the meso or field-level discursive work done in the generation of interorganisational collaborations. Lawrence et al. (1999) present a discursive model of the collaboration process at the organisational field level. Their model describes how collaborations need to identify what issue they will address, what interests should be represented and who should represent the interests. In order to do these three things, actors draw upon concepts and objects that consequently inform the discursive dynamics of the collaboration. These discursive dynamics relate to particular issues, interests and representation and then produce outcomes in the form of concepts, objects and action. However, questions remain about how the particular characteristics of emergent fields and multiple membership configurations affect how

the dimensions identified in Lawrence et al.'s (1999) model are manifested in institutionalisation processes.

By the private-public nature of their membership, corporate-university collaborations provide a particular opportunity to analyse these dimensions of collaborative institutionalisation. From a theoretical perspective, the main contributions about corporate-university collaborations come from the studies of technological change, and of managerial and industrial organisation (Birchall and Chanaron, 2007). Corporate-university collaborations usually link universities' intellectual resources to developing solutions for corporate problems, and, as a result, much of the research takes a resource-based view of the benefits of these collaborations (Elmuti et al., 2005; Santoro and Betts, 2002; Santoro, 2000). In particular, resource-based research deals with benefits to universities including access to research funding, proprietary technology research tools (i.e. belonging to the industry partner), marketing opportunities, industrial expertise, and student opportunities (Elmuti et al., 2005).

Studies have examined the collaboration processes associated with corporate-university linkages (Buys and Bursnall, 2007; Adams et al., 2001). Buys and Bursnall's (2007) phased model of community-university collaborations is based on Sargent and Water's (2004) framework of different phases in academic research collaborations (i.e. university-university). The resulting model shows how community-university collaborations require early clarification about goals, how they are cyclical and iterative in nature, and how they are facilitated by committed roles. Neither model has been specifically extended to undergraduate programme development;

however, this thesis will analyse the particular characteristics of discursive phases in degree development collaborations.

The Academic Capitalism (Slaughter and Leslie, 1997) and the Triple Helix (Etzkowitz and Leydesdorff, 2000) theoretical frameworks provide explanations for the influence of corporate-university collaborations on university research development. Academic Capitalism explains how increasing market-like activities at universities are prompted by pressures to innovate within a context of declining public research funding (Newson, 1998; Buchbinder and Newson, 1990). The Triple Helix model refers to interdependences between industry, university, and government around research, and explains the mechanisms that integrate technology development and application. Although these theories have been utilised in studies of university changes and collaborations (Etzkowitz and Leydesdorff, 2000; Buchbinder and Newson, 1990), they do not consider the processes that are involved with the emergence and development of new degrees.

University-industry research collaborations typically produce scientific and technological knowledge that is oriented to application. The importance of these research-oriented collaborations to innovative activities and knowledge production is well established (Cosh et al., 2006; Crocker and Usher, 2006), however these innovations do not include processes of undergraduate degree development (see Section 1.2).

There are, however, a few empirical studies focusing on non-research industry-university collaborations in the formation of undergraduate degrees (Trim, 2001;

Keithley and Redman, 1997; Boot and Evans, 1990). These studies examine the development of foundation degrees (Wilson et al., 2005; Lambert, 2003), engineering degrees (Bengiamin et al., 1998), and degrees utilising alternate delivery mechanisms like distance education (Bengiamin et al., 1998).

One of the earliest studies was by Boot and Evans (1990), who examined a project between Lancaster University and British Airways. They reported that degree development collaborations are characterised according to their intensity and scale, and they developed a “collaborative continuum” model for categorising types of collaborations. Although the model is useful for gauging degrees of collaborative engagement, their view of collaborations does not encompass issues of agency and meaning.

Researchers have also examined corporate-university collaborations in business sectors. Studies have investigated strategic alignment of technical and business goals (Birchall and Chanaron, 2007; Johnson and Johnston, 2001), motivations for collaborations (Lagiewski and Domoy, 2006), risks for the universities involved with business collaborations (Slotte and Tynjala, 2003; Newson, 1998; Buchbinder and Newson, 1990), and strategies for successful corporate universities (Meister, 1998). However, few studies have focused on collaborations between business and universities that are oriented to specific consumer service sectors. For example, Cosh et al.’s (2006) comprehensive survey of US and UK university-industry linkages examined all manufacturing and business services sectors, without considering consumer service sectors like retailing or hospitality management.

However, institutional researchers are interested in corporate-university collaborations because they reflect tensions between public and private interests (Powell and Colyvas, 2008; Colyvas and Powell, 2006). For example, in their review of the microfoundations of institutional theory, Powell and Colyvas (2008) focused on technology transfer projects involving university entrepreneurship. They found that the academic community had different responses, which reflected tensions between public and private interests; “As much as they recognized the unfamiliarity of their industry ties and questioned the legitimacy of their activities, they were also aware of the opportunities and benefits of their actions.” (p. 287). Further, their 2006 analysis of technology transfer demonstrated that it was important that legitimacy and taken-for-grantedness of the transfer practices be instantiated into the university’s rules and procedures (Colyvas and Powell, 2006). Their studies call for research that examines the genesis of organisational practices, and analyses the work that instantiates the legitimacy of industry involvement with university procedures.

Tensions between public and private institutional interests are also reflected in research related to the development of corporate universities. Accompanying the rise of corporate universities are questions about ownership of academia and benefits to corporations in the form of public relations and improved performance (Paroutis and Heracleous, 2013; Blass, 2005; Buchbinder and Newson, 1990).

The nature of agentic actors varies in relation to field conditions and also to institutionalisation processes that constitute change. The following section presents a review of research approaches to the processes of institutionalisation, which examine the interplay between institutionalisation, innovation and change.

2.6 Institutionalisation, Innovation and Change Processes

Institutional change is defined as movement between institutionally prescribed and legitimated activities (Hinings et al., 2004, p. 304). Inherent in traditional and neo-institutional views of institutions is the perspective that taken-for-granted institutional activities are likely to be resistant to change (Martin, 2003; Zucker, 1987; DiMaggio and Powell, 1983).

Neo-institutional theory has regarded isomorphic change as a process over time that occurs through normative, mimetic, and regulatory mechanisms (DiMaggio & Powell, 1983). Likewise, current research on institutionalising processes draws on theoretical explanations that incorporate time-based progressions of activities focusing on evolving phenomena (Langley et al., 2013). Consequently questions about institutionalisation focus on processes over time rather than on variances between dependent and independent variables (Langley et al., 2013). Studies have investigated institutionalising processes in the evolution of organisational practices (Gehman et al., 2013), identities (Jay, 2013), and norms (Maguire and Hardy, 2013).

The particular nature of change related to innovation has focused on the antecedents and consequences of innovation and on causal links between stages of development (Garud et al., 2013). However, studies adopting a process perspective of innovations (Van de Ven et al., 1999) focus on understanding the process of innovation through a sequence of events, including those associated with phases of invention, development and implementation (Garud et al., 2013; Van de Ven et al., 1999).

These three phases are characterised by evolutionary, relational and temporal complexities (Garud et al., 2013). Evolutionary complexities involve the ways that pressures are applied to processes and how these pressures are triggered by exogenous shocks which initiate development. Complexities in the relational aspects of processes are apparent in the interplay between the social elements influencing the three innovation phases and the consequent materials produced.

The study of temporal complexities includes the conceptualisation of processes as a succession of events, stages, cycles, or states in the three phases of innovation. This transactional view of innovation identifies events through observation in research settings or through the actions of participants (Van de Ven and Poole, 2005). In the latter approach, studies examine temporal patterns that are socially constructed during innovation processes. For example, Orlikowski and Yates (2002) argue that temporal structures like schedules and project plans, which are constructed by participants in innovation processes, shape the form of ongoing processes and events. Researchers of temporal structuration in innovation processes call for discursive studies investigating the nature of the synchronicity and dynamics related to the generation of temporal structures (Garud et al., 2013).

Studies of institutional change tend to focus on the extent to which new institutions have been adopted and stabilised. For example, Goodman and Steckler (1989) conceptualise institutionalisation along two dimensions: the breadth of integration of new behaviours and the depth (intensiveness) of the integration.

Furthermore, Tolbert and Zucker (1996) argue that full institutionalisation includes a complete and prevailing spread of new structures which they term sedimentation.

Greenwood et al. (2002) extended Tolbert and Zucker's (1996) approach by differentiating stages of nonisomorphic change and argued that theorisation is most important in mature fields and that legitimacy is primarily gained when diffusion occurs. This approach is expanded in Hining et al.'s (2004) change model which features a five-stage circular process including 1) pressures for change; 2) the sources of new practices from institutional entrepreneurs; 3) the legitimating processes of deinstitutionalisation and reinstitutionalisation; 4) the dynamics of formalisation of the new patterns of activity and 5) reinstitutionalisation and stability.

These explanations involve complete processes of diffusion and stabilisation of new practices whilst requiring the delegitimising of existing practices, and are particularly applicable for explaining change in mature fields (Hinings et al., 2004; Greenwood et al., 2002; Tolbert and Zucker, 1996). However, this current study will focus on the initial stages of change processes – i.e., the emergence and development of the constituting pillars of institutionalisation - and will examine institutionalising processes in an emergent field.

Studies of institutionalisation processes have argued that the initial phases are triggered by exogenous events, or "jolts" (Oliver, 1991), which destabilise established practices. These jolts occur through social (Greenwood et al., 2002; Holm, 1995), competitive (van Wijk et al., 2013; Thornton, 2002), regulative (Russo, 2001; Fox-Wolfgramm et al., 1998), and technological (Garud et al., 2002; Thornton and Ocasio, 1999) change. Whereas Hinings et al.'s (2004) model conceptualises that the role of

institutional entrepreneurs in response to these jolts is critical for change processes to progress, other research focuses on strategic responses to jolts (Oliver, 1991) and how collective action is instrumental in the institutionalisation processes (Van Wijk et al., 2013, Hargrave and van de Ven, 2006).

In particular, Hargrave and Van de Ven (2006) present an explanation of institutional innovation through a collective action model. They argue that collective action is one of four perspectives on institutional change. The other three are a) institutional design, which focuses on the intentional actions of institutional entrepreneurs with specific goals, b) institutional adaptation, which explains how organisations conform to external forces, and c) institutional diffusion which focuses on how and why institutional arrangements are adopted and diffused. Their model of collective action explains how change emerges “from a dialectical process in which opposing actors in the organizational field frame issues and construct networks in an attempt to introduce new institutional arrangements.” (Hargrave and Van de Ven, 2006, p. 865).

Hargrave and Van de Ven (2006) also note that previous research has tended to neglect the particulars of institutional innovation and the generative process of collective action. Exceptions occur in studies about collective action involving social movements and technology innovations. For example, Rao et al. (2000) investigate how market changes (i.e. market failures where demand exceeds supply) galvanise the initial stages of institutional development through localised social and political collective movements. Lounsbury et al. (2003) also focus on the role of social movements in the initial stages of institutional development and emphasise how field

frames (i.e. endogenous discourses that provide meaning for practices) enable changes in institutionalisation.

Studies of collective action have also concentrated on innovation in technology sectors (Garud et al., 2002; Leblebici et al., 1991). For example, Garud et al. (2002) studied Sun Microsystem's efforts to establish Java as a technological standard. They found that the innovation process involved confrontations between conflicting groups, which were manifested in numerous events over an extended period of time.

However, few researchers have focused on collective innovation in commercial service sectors. An exception is Delbridge and Edwards (2008) who study the instrumental nature of collective action in bringing about institutional change in a reified commercial sector, the superyacht industry. They argue that institutional changes result from the actions of multiple actors involved with opportunity creation. They found that these actions are not reliant on entrepreneurial skills, but are supported by social (i.e. consumer preferences) and economic (i.e. market) conditions and are promoted in the localised regulatory environment.

These divergent approaches to explaining the processes of institutionalisation are explicated by Dorado (2005). She asserts that three elements are crucial to the development of institutional change: agency, resource mobilisation, and organisational fields, and she also conceptualises multiple profiles of change. Her framework presents a way to view fields' capacities to recognise and support opportunities for change. Further, she defines three different agentic processes influencing change: entrepreneurship (DiMaggio, 1998), partaking (i.e., autonomous

actions of random actors), and convening (i.e. strategic collective action in uncertain fields). Her research suggests that there is a need for studies that investigate change in uncertain or emergent fields. In particular, she claims that there is a need for research that analyses how processes are collectively initiated in emergent fields like the retail management education field.

These studies, therefore, contribute to understanding how the emergence and initial development of institutional processes are constituted both by collective actions and localised institutional structures. However, these approaches do not focus on how specific discursive work is done in the emergence of specific institutional practices. In particular, whilst they provide ways to understand the evolutionary, relational and temporal dimensions of innovative changes, there is little emphasis on the role of discursive agency in generating innovative institutionalising processes.

A practice approach, however, emphasises the role of agency in institutionalisation and the following section discusses how researchers have examined the interaction of a practice approach with the structuration and agency involved with institutionalisation.

2.7 Practice Work

Institutional theory claims that action is not only influenced by institutions; action also creates, maintains, and changes institutions (Barley and Tolbert, 1997). Therefore, degree development processes are inherently socially constructed and structure the actions related to them. This current study considers the specific interplay between

actions and structuration in the development of a new institutional practice of degree development.

Practice theory describes how activities of individuals and organisations work to affect events in order to achieve outcomes (Lawrence and Suddaby, 2006). Jarzabkowski et al. (2009) define a practice approach as “how actors interact with, construct, and draw upon the social and physical features of context in the everyday activities that constitute practice.” (p. 288). For example, Orlikowski (2000) applies a practice lens to examining how technology is constituted in institutional structures and presents two inherent issues – 1) that they become stabilised after development and 2) that they embody structures, thereby situating them in artifacts rather than in the beliefs that give form and shape to those artifacts (Giddens, 1979). Likewise, even though a university degree represents stability and provides a university artifact of programme completion, the degree development process is the focal structure in this study, and not the degree itself.

Practice theory identifies the notion of institutional carriers which move beliefs and norms in the evolution of institutional practices (Scott, 2003). Carrier professionals like educators and university faculties are, therefore, preeminent agents and they act “as definers, interpreters, and appliers of institutional elements” (Scott, 2008, p. 223). Carriers are instrumental in institutionalisation processes because they convey regulatory, normative, and cultural—cognitive institutional elements.

Giddens (1979, p. 65) contends that “rules and practices only exist in conjunction with one another” and this view is adopted in Suddaby et al.’s (2013) study of strategy-in-

practice which argues that a neo-institutional lens provides a way to explain influences of institutions in the macro-environment on specific individual and organisational actions. They also argue that these specific actions are significant because they can produce shifts in institutional structures. This integrated view of practices and institutions provides a way to explain how structures of degree development are constituted through actors' interactions with institutionalised elements like government funding requirements, university policies and procedures, and curriculum development processes (i.e. regulative, normative, and cultural-cognitive institutional elements).

A practice approach argues that attending to peoples' behaviour in organisational settings helps to explain how organisational structures actually work and how they are constituted by peoples' actions (Suddaby et al., 2013). Likewise, Lawrence and Suddaby's (2006) institutional work framework, presents a practice perspective for understanding "the knowledgeable, creative and practical work of individual and collective actors aimed at creating, maintaining and transforming institutions" (p. 219). This study is oriented to understanding and explaining institutional development processes, and focuses on the actual discursive work that actors do when developing an institutional structure. By focusing on how actors interact with the practice of degree development, this investigation will focus on their ongoing actions towards constituting an organisational structure and institutional work theory provides a lens for examining the actual work involved with developing institutional structures.

The following section describes institutional work theory and reviews related empirical work in order to establish how aspects of institutional work theory inform this

examination of the development of institutional structures. In particular, the review evaluates how the current study fits with the existing knowledge of institutional work and, helps to focus the study's research question and objectives.

2.8 Institutional Work Theory

Institutional work theory has its origins in the study of organisations through an institutional theory lens. Whereas traditional and neo-institutional theories explain how institutions affect organisations, institutional work theory explains how actions affect institutions. Institutional work is defined as “the purposive action of individuals and organizations aimed at creating, maintaining, and disrupting institutions” (Lawrence and Suddaby, 2006, p. 216).

Institutional work theory provides a way to examine the purposive, situated actions of actors dealing with the demands of their environment (Lawrence and Suddaby, 2006). The theory addresses change from the perspective of the social construction, related agency and processes involved with creating, maintaining, and disrupting institutions (Lawrence et al., 2009; Lawrence and Suddaby, 2006). Change is examined from the perspective that the evolution of institutions is linked to dynamics in organisational structures and environments (Fligstein and McAdam, 2011; Creed et al., 2010; Oliver, 1991). Institutional working practices constitute a form of institutional agency that is both emergent and embedded (Lawrence et al., 2009).

Lawrence and Suddaby (2006) conducted a review of institutional research that resulted in a framework connecting empirical studies of practical actions involved with creating, maintaining, and disrupting institutions. The framework identifies three

categories of institutional work and ascribes different types of actions to each category.

The categories and their related actions are summarised in Table 2.1. The table presents a description of each category, and it also presents the codes which are used throughout this study's analysis to identify each type of work.

Table 2.1: Institutional Work Model—adapted from: Lawrence, T.B. and Suddaby, R. (2006) 'Institutions and Institutional Work', in S. Clegg (Ed.), *Handbook of organization studies*, London, Sage Pub.

Element	Description
CREATING (C)	
<i>Political Work</i>	
C:A Advocacy	Mobilising political and regulatory support through direct/deliberate action, like lobbying, advertising and litigation
C:D Defining	Constructing rule systems to confer status or identity, define membership boundaries, or create status hierarchies within field.
C:V Vesting	Creating rules through government authority to reallocate property rights
<i>Reconfiguring Belief Systems</i>	
C:CI Constructing identities	Defining the relationship between actors and fields in which they operate
C:CNA Changing Normative Associations	Re-making the connections between sets of practices and moral and cultural foundations for practices
C:CNN Constructing Normative Networks	Constructing interorganisational connections through which practices become normatively sanctioned and form relevant peer group for normative compliance, monitoring, and evaluation.
<i>Altering Abstract categorizations</i>	
C:M Mimicry	Drawing on existing patterns of action to articulate and legitimate new ones
C:T Theorising	Developing concepts and beliefs that support new institutions
C:E Educating	Providing actors with knowledge necessary to use/interact with new structures
MAINTAINING (M)	
<i>Ensuring adherence to rules</i>	
M:E Enabling	Creating rules to facilitate, supplement, support institutions, including creation of authorising agents or new roles or diverting resources (i.e., taxation) required to ensure institutional survival
M:P Policing	Ensuring compliance through enforcement, auditing and monitoring

Element	Description
M:D Deterring	Establishing coercive barriers to institutional change
<i>Reproducing norms/belief systems</i>	
M:VD Valorising/ demonising	Providing for public consumption especially positive and especially negative examples illustrating normative foundations of institutions
M:M Mythologising	Preserving normative underpinnings of institutions by mythologising history
M:ER Embedding & Routinising	Infusing the normative foundations of an institution into participants' routines and organisational practices.
DISRUPTING (D)	
D:DSR Disconnecting Sanctions/ rewards	Working through state apparatus to disconnect rewards and sanctions from practices, technologies or rules
D:DMF Disassociating moral foundations	Disassociating practices, rules or technologies from moral foundations as appropriate within specific cultural context.
D:UAB Undermining assumptions & beliefs	Removing costs, facilitating new ways of acting that replace existing templates, or decreasing perceived risks of innovation and differentiation

The following section reviews research related to each of the framework's categories.

2.8.1 Institutional Work: Creating Institutions

The first of the three categories of the model describes the types of actions associated with creating institutions – a) political work, b) reconfiguring belief systems and c) altering abstract categorisations.

- a) When doing political work, actors reconstruct how to get access to material resources through advocating (Elsbach and Sutton, 1992), defining rules and boundaries (Wedlin, 2010; Lounsbury and Crumley, 2007) and vesting of government authority (Lounsbury, 2001; Russo, 2001).

Advocating (i.e. C:A) is the mobilisation of political and regulatory support through persuasive actions, like lobbying, advertising and litigation, which is oriented to acquiring legitimacy for new institutions (Suchman, 1995).

Actions oriented toward defining (i.e. C:D) include the construction of rules about status, boundaries of membership, accreditation, or hierarchies within a field (Lawrence and Suddaby, 2006). Wedlin's (2010) study of the development of international rankings of management education for legitimising graduate programmes is an example of defining work.

Finally, vesting (i.e. C:V) involves the creation of rules that confer property rights through government authority. For example, Russo (2001) studies the processes involved with changing legislative rules surrounding market relations in the utility field. Vesting can also involve funding, which is often particularly important in the early stages of institutional development (Greenwood et al., 2002).

- b) The reconfiguring of belief systems occurs by constructing identities (Khaire and Wadhwani, 2010; Covalleski et al., 2003; Oakes et al., 1998), by changing relationships between norms and their respective fields (Maguire et al., 2004; Zilber, 2002), and by constructing normative networks (Lawrence et al., 2002; Orsato et al., 2002).

The construction of identities (i.e. C:CI) is a form of institutional work that is focused on the relationship between actors and their institutional field. An example is Oakes et al.'s (1998) study of institutional change in Alberta

museums, in which the institutions are reoriented to a business model and work is done to reorient museum workers' identities from cultural workers to business people.

The changing of normative associations (i.e. C:CNA) is also aimed at creating new institutions, and it occurs at the norm-field interface when new associations between practices and their moral and cultural foundations are made. An example is Zilber's (2002) institutional study of the shift in ideologies in an Israeli rape crisis centre from a feminist base to a new therapeutic focus.

Normative networks (i.e. C:CNN) are interorganisational connections through which practices become sanctioned and which form the peer group for monitoring and evaluating compliance with related norms. The relationships between actors in the field are thus changed by this type of institutional work. An example is Lawrence et al.'s (2002) study of the formation of normative networks in the field of child nutrition in Palestine, where the networks formed practices that were narrowly, weakly diffused (i.e. proto-institutions). These networks were characterised by varying degrees of the two collaborative dimensions of involvement and embeddedness. As this current study aims to analyse the nature of collaborations involved with institutionalisation, it will also analyse the interactions associated with this form of institutional work.

- c) Altering abstract categorisations refers to altering the cognitive beliefs that inform action and that provide patterns for others to follow. Beliefs can be altered by providing meaningful and understandable patterns for people to follow. Lawrence

and Suddaby (2006) identify three ways to alter beliefs – mimicking what others have done (Hargadon and Douglas, 2001; Jones, 2001), theorising (Maguire et al., 2004; Kitchener, 2002; Oakes et al., 1998), and educating (Woywode, 2002; Hargadon and Douglas, 2001; Lounsbury, 2001).

Mimicking (i.e. C:M) draws on other patterns to legitimate new structures. An example of mimicry is found in Hargadon and Douglas' (2001) study of the institutionalisation of electric light, in which they describe how Edison mimicked the features of the existing oil-lamp lighting in the new electric lighting in order to ease its acceptance by the public.

Theorising (i.e. C:T) is 'the development and specification of abstract categories, and the elaboration of chains of cause and effect' (Greenwood et al., 2002, p. 60). It involves developing theories or models to explain an institutional structure. Theorising can involve specifying an organisational failing for which an innovation will be a solution, and thereby providing justification for the innovation (Tolbert and Zucker, 1996). For example, Oakes et al.'s (1998) study of Alberta museums explains how those institutions implemented necessary business planning processes by naming and describing new elements and processes. These theorising actions accelerated the diffusion of the new organisational processes and roles.

Educating (i.e. C:E) actors in skills and knowledge necessary to support new institutions is another form of institutional work. An example is the institutionalisation of electric lighting examined in Hargadon and Douglas' (2001)

study discussed above. The diffusion of the new lighting systems required processes which educated consumers about how to use them.

2.8.2 Institutional Work: Maintaining Institutions

The work involved with maintaining institutions includes ensuring adherence to rules through a) enabling (Trank and Washington, 2009; Greenwood et al., 2002; Guler et al., 2002), b) policing (Currie et al., 2012; Fox-Wolfgramm et al., 1998), and c) deterring (Rojas, 2010; Guler et al., 2002).

- a) Enabling work (i.e. M:E) involves creating rules to support institutions. Enabling is illustrated in Guler et al.'s (2002) study of the institutionalisation of ISO 9000 compliance, which authorised organisations to act as registrars, thereby creating responsibility for maintaining the institution.
- b) Policing (i.e. M:P) ensures maintenance of institutions through enforcement, auditing, and monitoring. Fox-Wolfgramm et al.'s (1998) study examines the role of auditing to ensure non-discriminatory lending in the banking field.
- c) Deterring change through coercive barriers (i.e. M:D) is also used in maintaining institutions through compliance. For example, Rojas (2010) investigates coercive deterrence in a US college setting, when the College president implemented rules of compliance during a 1968 student strike.

Maintaining institutions is also related to reproducing norms and belief systems by providing positive and negative examples of institutions' normative foundations. This

type of maintaining work includes valorising or demonising public examples (Zilber, 2009; Angus, 1993), mythologising history (Dacin et al., 2010; Angus, 1993), and embedding and routinising practices (Trank and Washington, 2009; Zilber, 2009; Angus, 1993). Angus' (1993) study of a Christian Brothers College illustrates all three forms of reproducing norms. The School's normative institutions of machismo and competition are maintained through public recognition/denouncement of students' behaviour (i.e. M:VD). The mythologising (i.e. M:M) of School history through oft-repeated stories of competitive victories also maintains the institutions. The School also embeds (i.e. M:ER) the institutions in routine activities and events like feasts, in which symbols and artifacts of machismo or competitive values are incorporated.

2.8.3 Institutional Work: Disrupting Institutions

Disrupting institutions involves attacking or undermining the institutional mechanisms that compel actors to comply. Three general approaches include disconnecting sanctions or rewards (Jones, 2001; Holm, 1995), disassociating moral foundations (Greenwood and Suddaby, 2006; Ahmadjian and Robinson, 2001), and undermining assumptions and beliefs (Singh and Jayanti, 2013).

Jones' (2001) study of the early American film industry illustrates how the courts disrupted (i.e. D:DSR) technical institutions created to reward existing corporations and provide a competitive advantage. Ahmadjian and Robinson's (2001) study of the prevailing institution of permanent employment in Japan illustrates how moral foundations can be disconnected from institutional beliefs (i.e. D:DMF). Singh and Jayanti's (2013) study of sales tactics in the pharmaceutical industry illustrates how clients can undermine sales professionals' beliefs (i.e. D:UAB).

The multiple forms of institutional work described in the Lawrence and Suddaby (2006) categories provide ways to view how the degree development process evolved. For example, whilst this current study examines the process of creating a new degree development process, the legitimacy of the process is also linked to maintaining the established legitimacy of the various institutional elements related to university credentialing. In addition, because the degree development originates in Ryerson's Faculty of Continuing Education, the University's traditional degree development route involving the full-time Faculties is disrupted (see Section 1.2). As a result, this study examines multiple forms of institutional work.

The Lawrence and Suddaby (2006) model presents abstract categories of institutional work which are derived from empirical studies (Empsom et al., 2013). Table 2.2 (Appendix A) presents a summary of the studies, noting the research method, research setting, type of institutional work studied (using codes listed in Table 2.1), and key findings. Some of the studies listed focus on a single form of institutional work (i.e. creating, maintaining or disrupting) and some on the convergences of two forms, thereby demonstrating that institutional work is not necessarily a discrete activity. The following section evaluates how studies that focus on multiple forms of institutional work help to refine this study's research question and objectives.

2.8.4 Multiple Forms of Institutional Work

Several studies report how multiple forms of institutional work operate simultaneously in field institutionalism. Specifically, this section analyses studies by Empsom et al. (2013), Currie et al., 2010; Zietsma and Lawrence (2010); Hirsh and Bermiss (2009),

Jarzabkowski et al. (2009), Zietsma and McKnight (2009) and Jones (2001) which examine convergences of multiple forms of institutional work.

Empsom et al. (2013) study the dyadic relationships between managing partners and management professionals in the corporatisation of international law firm partnerships. Their study responds to Lawrence et al.'s (2011) call for empirical examinations of institutional work at the individual level of analysis. The study describes simultaneous creating, maintaining and disrupting institutional work, and the interactions of multiple actors and institutions. They identify seven main forms of institutional work in which the two types of professionals engage, and emphasise the phenomenon of sedimentation, or settling, of the institution. Although the study focuses on the micro-level of analysis, their findings of convergences of institutional work inform this current study's emphasis on the simultaneous occurrence of multiple forms of institutional work.

Currie et al., (2010) examine the institutional work done by elite medical professionals to maintain their positioning in medical hierarchies. They explain how different types of work interact when creating and maintaining institutions.

Hirsch and Bermiss's (2009) study of the transformation of the Czech Republic also reports that forms of institutional work are interconnected, and that in times of large-scale disruption, institutional creative and disruptive processes are connected. However, their study produces a macro-level examination based on a historical analysis, and therefore does not focus on how these types of processes are interconnected at the meso-field level.

Zietsma and Lawrence's (2010) study of the British Columbia forest industry provides particular insights about the role of institutional work in the transformation of an organisational field. They focus on the interplay of practice and boundary work, where practice work incorporates the three forms of institutional work, and boundary work includes specific actions focused on the industry's jurisdictional boundaries. They argue that these two types of work interact during distinct stages of innovation, conflict, stability, and restabilisation. Consequently, their study provides an explanation of how exogenous events like consumer market shifts (see Section 1.4.4.) are translated across field boundaries into field-level practices.

Jarzabkowski et al. (2009) examine multiple forms of institutional work by taking a practice approach to understanding the pluralistic institutional logics evident in the implementation of a utility company product. Their findings elaborate the nature of institutional work found in interactions between organisational members in pluralistic institutions, when logics are interdependent and relational. They focus on the interdependencies between institutional logic work, where departmental actors work to maintain opposing logics by creating their own institutional logics and disrupting opposing logics. The pluralistic institutional setting of their research is similar to Ryerson University's pluralistic environment. In particular, Ryerson's traditional degree development route was regarded as the purview of the full-time faculties, rather than the Faculty of Continuing Education (see Section 1.2).

Zietsma and McKnight's (2009) study revisits the British Columbia forest industry and provides empirical evidence of convergences between different forms of institutional

work, naming them competitive convergence and collaborative co-creation. They study institutionalisation involving multiple embedded actors who created new structures, and also maintained and disrupted existing institutional structures. Although their study focuses on a field where the constituent actors are contentious, their findings about how multiple forms of institutional work converge provide support for this study's examination of multiple forms of institutional work.

Jones' (2001) historical analysis of the co-evolution of the American film industry is a multi-level investigation, using both quantitative and qualitative methods. The qualitative analysis is based on a narrative and timeline of key events and relationships. She finds discrete examples of the three forms of institutional work (creating, maintaining, and disrupting), including mimicry of theatre symbols and artifacts, policing through technology patents, and disruption by courts that rescinded patents, thereby establishing that multiple forms of institutional work can operate simultaneously in field institutionalisation.

The review of empirical studies of institutional work (see Appendix A) provides support for the formulation of this study in the following ways. It provides empirical examples of the different forms of institutional work, which illustrate how the abstract categories occur in real-life (Zietsma and Lawrence, 2010). In addition, the examples demonstrate that institutional work is not necessarily a discrete activity; multiple, collective actors can engage in multiple, convergent forms of institutional work.

Questions remain, however, about how this theory contributes to examinations of institutionalisation processes. For example, the particular field influences found in

consumer service sectors are rarely featured in empirical research. Only one empirical study of institutional work involving the retail management field (Messeghem and Fourquet-Courbet, 2013) was found in this review of empirical studies (see Appendix A). Messeghem and Fourquet-Courbet (2013) utilise analyses of the weblog arguments of a major French retailer targeting retailing legislation. Their study presents the institutional entrepreneurial work that altered the institutional logics related to the legislation. Noting that there has been a call for more research of institutional work occurring in context and involving corporations (Suddaby, 2010), this thesis will provide an empirical study of institutional work occurring in the context of a consumer service field largely populated by corporations.

There are also questions remaining about the nature of the agency and effort involved with simultaneous occurrences of multiple forms of institutional work. For example, Battilana and D'Aunno (2009) present a model of the dimensions of agency related to the three forms of institutional work. The discrete dimensions are categorised according to the three types of agency described by Emirbayer and Mische (1998): iterative (or habitual), practical-evaluative and projective agency. However, the Battilana and D'Aunno (2009) model does not account for types of agency evident in multiple and convergent forms of institutional work.

Finally the review identifies that empirical studies of institutional work have not examined the discursive legitimisation of field boundaries through degree development. A number of studies examine professionalising of occupational fields through identity creation (Goodrick and Reay, 2010, Lounsbury, 2002) and Slager et al. (2012) examines institutional work in the development of standards for the investment

industry, but there are no studies that focus on boundary work involving professionalisation through degree development. Seeing that university degrees often provide the education requirements within a professionalised occupation, this current examination of degree development contributes to further understanding the related processes.

Whereas institutional work theory provides the lens for categorising degree development processes, the review found several studies (see Appendix A) which also provide evidence of the constructive role of language and discourses in institutional work. For example, Hardy et al.'s (2005) and Lawrence et al.'s (2002) studies of collaborations investigated how conversations contributed to their formation, and Angus' (1993) study of IW in a Christian Brothers College examined how narratives were instrumental to maintaining institutions. However, the emphasis of these studies is on the effects of and the interactions involved with discursive institutionalising actions rather than on the interplay of the actual discursive mechanisms with IW actions. The following section examines research that has analysed institutionalising discursive work.

2.9 Institutionalising Discursive Work

Discursive work is defined as “discursive activity carried out to influence processes of social construction” (Phillips and Lawrence, 2012, p. 225). Discursive work has been a prominent focus in institutional work research (Grant and Marshak, 2011; Grant and Iedema, 2005; Boje et al., 2004). Discourse-oriented studies examine the interplay of institutional and discursive work (Paroutis and Heracleous, 2013; Dacin et al., 2010; Lawrence et al., 1999) and have found that because discourses are constituted from

texts that define what is acceptable, they institutionalise practices and behaviours (Hardy, 2010; Phillips et al., 2004).

Institutions are secured by structured, coherent discourses that produce shared, taken-for-granted beliefs (Phillips et al., 2004). Discursive strategies have been identified as the primary process by which institutional development takes place (Suddaby and Greenwood, 2005; Munir and Phillips, 2005; Phillips et al., 2004).

Institutions can be influenced by changes in any of the multiple elements of production, distribution and consumption of texts (Maguire, 2010; Maguire and Hardy, 2009, 2006). Phillips et al., (2004) present a discursive model of institutionalism (DMI) in which they assert that the coherence and structure of discursive work contributes to institutionalisation. Institutionalisation is likely when coherent, structured work relates to a value-laden social reality, like a degree development process or a professionalised occupational identity. The DMI model focuses on the process of actions producing texts, of texts becoming embedded in discourses, and of discourses producing institutions. Institutions then enable or constrain actions, prompting reiterations of the process. According to this conceptualisation, the production, distribution and consumption of texts are critical to the institutionalisation process and the types or genres of texts are instrumental in the process.

The concept of genres of texts provides a classification system for analysing discursive actions in institutionalisation processes. Genres are texts or discursive actions that are grouped together, are based on recurring situations, and share a communicative purpose (Miller, 1984). Viewing genres within structuration processes

(like the development of a degree) captures the interaction between action and institutionalised practices (Yates and Orlikowski, 1992).

In his study of DDT substitution, Maguire (2004) uses a genre approach to view how multiple elements of texts are embedded in discourse. He categorised texts according to their genre in order to view stable aspects of their production, distribution and consumption and to discern related discursive patterns (Maguire, 2004; Fairclough, 1992). He determines four categories of genres: 1) Marketing texts which are produced to increase sales and include advertisements; 2) Technical texts which are produced to add to a body of scientific knowledge and include scientific articles; 3) Popular texts which are produced for a mass readership and include newspaper articles; and 4) Policy texts which are produced to change legislation and include government committee reports. Maguire's (2004) genre categories provide a way to analyse (i.e. categorise) the texts which constitute degree development processes.

One of the central tenants of the DMI model (Phillips et al., 2004) is that discursive actions that convey legitimisation are crucial for institutionalisation to occur (Taylor and Van Every, 2000). Legitimising discursive actions provide explanations and justifications for institutionalising processes (Phillips et al., 2004). Therefore, it is particularly important that texts and constituent discursive themes convey legitimisation when establishing new organisational practices (i.e. like degree development processes) (Taylor and Van Every, 2000). The mechanisms by which discursive legitimisation is constituted are discussed in the following section.

2.10 Institutional Legitimation

Legitimacy is defined as “a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions” (Deephouse and Suchman, 2008, p. 52; Suchman 1995, p. 574). Legitimacy is key to organisational structuration and fundamental to institutional work (Lawrence and Suddaby, 2006; Deephouse, 1996; Suchman, 1995).

Legitimation refers to the discursive practices involved with acquiring legitimacy (Vaara and Monin, 2010; Van Leeuwen, 2007; van Dijk, 1998). Discursive legitimation is the “discursive sensemaking processes through which legitimacy is established.” (Vaara and Monin, 2010, p. 5). Particular discursive strategies are identified by researchers as most likely to have institutionalising effects, including framing legitimating discourses that are relevant to intended audiences and that show how the institutional development is better than the status quo (Leca et al., 2008; Seo and Creed, 2002; Holm, 1995). Researchers have also shown the importance of discursive practices like impression management (Elsbach and Sutton, 1992), issue framing (Creed et al., 2002) and rhetorical justification (Vaara et al., 2006) for establishing legitimacy.

Institutional researchers have examined the role that discourses play in the legitimation of change (Vaara and Tienari, 2008; Suddaby and Greenwood, 2005; Van Leeuwen and Wodak, 1999). In particular, they report that legitimation strategies are central to institutionalisation processes in emergent fields. Studies have been conducted in the emergent fields of new technology (Hargadon and

Douglas, 2001), new organisational practices (Kostova and Roth, 2002), and new industries (Leblebici et al., 1991). Studies of legitimation in emergent occupational fields show how discourses about standardisation perform legitimating work (Slager et al., 2012; Perkmann and Spicer, 2008; Garud et al., 2002). For example, Slager et al.'s (2012) study of the development of industry-wide standards in the investment industry shows how legitimation is accomplished through convening multiple actors. These actors create knowledge and expertise and use educating discursive processes to disseminate compliance information. Garud et al.'s (2002) study of the standardisation of Java technology shows the importance of legitimation strategies that recognise both social and political influences in emergent fields. Researchers have also applied a strategic lens to legitimation, including Suddaby and Greenwood (2005) who examine the formation of a new institutional field, i.e., a multidisciplinary professional partnership. They argue that comprehensibility is central to the initial stages of institutionalisation and that using a common language and theorising the change are central dimensions of comprehensibility. Although these studies report how legitimation strategies are utilised in institutionalisation processes in emergent fields, they do not provide explanations of how specific legitimation strategies influence institutionalisation.

Van Leeuwen (2007) presents a model of four types of discursive legitimating strategies. *Authorisation* provides legitimation through references to the authority of tradition, custom, law, and authoritative actors. *Rationalisation* legitimises by referring to the utility of actions based on accepted knowledge claims, including instrumental and theoretical claims. Instrumental rationality legitimates practices by referring to their usefulness and theoretical rationality legitimates by referring to a

natural order. *Moral evaluation* legitimises by referring to specific value systems, and by utilising descriptions or analogies that communicate positive or negative values. Finally, *mythopoesis* provides legitimation through narratives and stories.

Vaara and Monin (2010) utilise van Leeuwen's (2007) model in their study of discursive legitimation and action in mergers and acquisitions. Their study shows how the model's dimensions are operationalised in an empirical study, and are able to analyse specific discourses and their linkages to broader discourses. In order to analyse the legitimating discourses used in degree development processes, this current study will apply the model's dimensions to the data analysis.

The discursive legitimation of the professional nature of occupational identities is a form of institutional work important to institutional change (Lawrence and Suddaby, 2006). It is important because identities describe the relationship between actors and the field within which actors operate (Lawrence and Suddaby, 2006; Bourdieu and Wacquant, 1992). For example, Goodrick and Reay (2010) study the role of discursive legitimation strategies in the professionalisation of nursing identities. Their study analyses legitimation strategies and finds that those that emphasise moral legitimacy are particularly important for the professionalisation of nursing identities. Likewise, discursive legitimation work is important to professionalisation of retail management.

However, whereas Goodrick and Reay's (2010) study is situated in a mature field where professional credentials are established, retail management is an emergent field without established professionalising credentials. Consequently, this study

examines how the discursive legitimization of a credential development practice contributes to the professionalisation of an emergent field. The professionalisation process and related relevance of recognised credentials to developing occupational boundaries are discussed in the following sections.

2.11 Professionalisation

Three dimensions have been used in sociological research to conceptualise professional occupations: a) professions, b) professionalisation, and c) professionalism (Evetts, 2011).

a) Professions: Professions are viewed in institutional research as carriers of institutional elements (Muzio et al., 2013; Suddaby and Viale, 2011; Reed, 1996). They are knowledge-based categories of occupations that control scarce expertise in ways that cannot be easily imitated, and which usually follow periods of study in higher education institutions (Reed, 1996). There are three major groupings of professions – liberal/independent professions, entrepreneurial professions, and managerial or corporate professions (Reed, 1996).

The liberal/independent professions control abstract knowledge and practical skills in specific areas of work, and maximise the stability, portability, generality and legitimacy of expertise (Reed, 1996). They typically deal with situations of risk and may be closed to non-members (Evetts, 2003). These professions traditionally limit the number of individuals allowed to provide a service (i.e. medical/legal advice), and maintain skill scarcity to enhance the value of their work (Larson, 1979).

Entrepreneurial professions also include knowledge workers and focus on specialised knowledge and skills that are difficult to replicate in formal organisations (Reed, 1996). These workers are typically found in sectors that value innovation and future value, rather than immediate outcomes.

Managerial professions are not regarded as having the same degree of legitimacy as the other types of professions (Reed, 1996; Reed and Anthony, 1992). In their study of the professionalisation of management, Reed and Anthony (1992) identify how management professions are heterogeneous, are dependent on their organisations, have limited control of knowledge, have limited discretion and autonomy, and have a weak occupational identity.

b) Professionalisation: Professionalisation is a process for achieving the status of a profession, where an occupational group has closure to non-members (Larson, 1979). Theories of traits and control have been used to examine professionalisation (Mikkelsen, 1996; Tseng, 1992). Trait theories summarise characteristics an occupation needs to become a profession, including having a systematic theory, credentials, induction, and codes of ethics (Arndt and Bigelow, 2005; Tseng, 1992). Control theories relate to the amount of power a group exerts in terms of their work and the market in which they operate. For example, Reed and Anthony (1992) argue that the professionalisation of British management through a shift to standardised, competency based management education, was impeded by the exogenous institutional and social environment in which managerial work is embedded.

Certain occupational groups endeavour to professionalise their image in order to enhance their credibility, autonomy, and market position. Evetts (2011; 2006) argues that there are aspects of a professional image which contribute to the appeal of managerial professionalisation, including control of work environments, sanctioned governance roles for professional associations, common educational requirements, strong occupational identities, and trusting relationships with stakeholders. Studies have examined professionalisation in hospital administration (Arndt and Bigelow, 2005), management consulting (Kipping, 2011; Muzio et al., 2011), and the hospitality industry (Watson, 2002).

c) Professionalism: Professionalism is a value that is espoused by occupations and this value provides a frame for a discourse of professionalism (Evetts, 2011).

Professionalism is “a rhetorical device and ideological resource to legitimate the claims various expert groups and their representative groups make on society’s material and cultural base” (Reed and Anthony 1992, p. 596). A discourse of professionalism is often used by emerging professions to gain status and create identity (Evetts, 2003). Empirical research on managerial professionalisation has focused on management consulting, executive search and project management occupations (Kipping, 2011; Muzio et al, 2011). This current study will examine how the process of professionalisation occurs through a discourse of professionalism, and how this discourse of professionalism conveys the legitimisation of new structures (i.e. degree development processes) in emergent fields.

The knowledge and skill base of managerial professions, like retail management, is typically oriented to a specific business or organisation and lacks the degree of

abstract knowledge and generalised skill applicability of the other types of professions. Higher education credentials provide these occupations with knowledge bases that include abstract academic knowledge and which define and legitimate 'professional work', expertise, and related systems of occupational control (Reed and Anthony, 1996; Abbott, 1988). Managerial professions regard credentialism through higher education as a core strategy for establishing legitimacy (Greenwood et al., 2002; Reed, 1996; Wilensky, 1964).

Credentialism, as described by Randall Collins (1978), is rooted in Weber's (1968) conflict theory and claims that educational credentials are status symbols that do not indicate actual achievement. Rather they are the result of the competition for good jobs and, through expanded educational opportunities, the raising of professional bars to potential members who have not previously been eligible. Educational credentialing theory purports that it is a legitimate notion that degree holders have advantages when it comes to organisational and occupational recruiting (Brown, 2001), and this notion is related to the symbolic role of credentials. The creation and acceptance of higher education credentials is the carrier upon which organisational actors rely to create the meaning of legitimacy. Typically, educational requirements are raised in the largest and most influential organisations to maintain the prestige of their managerial ranks, thereby becoming a standard of legitimacy used in managerial recruitment and promotion (Collins, 1979), and a feature of managerial professionalisation.

Educational requirements for practitioners are important elements of jurisdictional work for occupations that professionalise (Larson, 1979; Wilenski, 1962). Critical to

the professionalisation of occupational identities is the development, codification, and protection of the occupation's boundaries and jurisdictions (Abbott, 1988).

Occupational groups gain 'jurisdictional claim' over task-based expertise via educational credentials (Arndt and Bigelow, 2005; Reed and Anthony, 1996).

In particular, because universities occupy a highly institutionalised status in society (Meyer, 1977), their structures (i.e. degrees, curriculum, admission requirements, promotion criteria) have legitimating effects on occupations (Meyer, 1977). According to Meyer (1977), the biggest predictor of the relative prestige of an occupation is the educational credentialing it represents. "The possession of the best certified and educated people is a main index of the advanced status of a hospital, a school, often a business organization, and indeed a society itself." (Meyer, 1977, p. 66).

Key aspects of boundary work for occupations that undergo professionalisation are a jurisdiction, a body of knowledge to guide practice, and the education of practitioners (Muzio et al., 2011; Arndt and Bigelow, 2005). Muzio et al.'s (2011) study of three corporate professions shows that managerial professionalisation exhibits mechanisms in these key aspects. In particular, they emphasise that professionalisation involves "developing alternative types of credentials which emphasise competences, transferable skills and industry knowledge and experience" (p. 451). In their examination of the creation of an occupational boundary for hospital administration, Arndt and Bigelow (2005) discursively operationalise the three aspects of boundary work. Their study shows that successful professionalisation gives authority to the occupation so it can shape social reality in its field, which in the case of their study, is the ways that members define themselves by gender. The analysis

in this current study will also discursively operationalise these three aspects of boundary work and examine how they constitute cultural-cognitive institutional elements related to the professionalisation of retail management.

Professionalisation and credentialism in managerial professions and in emergent fields like retail management are influenced by the characteristics of the occupational environment (Reed and Anthony, 1992). Thomas and Thomas' (2014) empirical study of professionalisation is set in a service sector (i.e. hospitality management), but the particular legitimating influences experienced with a consumer service sector, like retail management, have not been examined. Likewise, although studies have examined occupational boundary work (Zietsma and Lawrence, 2010; Arndt and Bigelow, 2005), there is a paucity of research focusing on the particular discursive processes that contribute to professionalisation through degree development.

In order to develop the research focus that would help determine the particular nature of legitimation and professionalisation in the retail management occupational field, the following section presents a discussion of the research aimed at institutional issues in retail management and management education.

2.12 Institutional Research in Retail Management and Management Education

Institutional change is a recurring feature of retail related research, focusing on the evolution of national and multinational systems and case studies of retail firms. In his review of institutional change in retailing, Brown (1987) notes that the three basic approaches used in the retail management research literature are environmental

theory, cyclical theory, and conflict theory. The three approaches are applied to studies of retail locations, economic development processes, product life cycles, the evolution of national and intra-national retail systems and retail classifications (Brown, 1987; Hollander, 1986).

An environmental approach to institutional evolution suggests that changes in the external marketplace are reflected in the retail system and that retail institutions react in direct response to environmental conditions. Environmental factors influence the introduction, acceptance, maturation and survival of retail institutions (Markin and Duncan, 1981). The overarching premise is that the ability to adapt to changes in the operational environment is a prerequisite for retail longevity.

Cyclical theories of retail institutional evolution purport that change involves the repetition of earlier patterns. Examples include the Retail Accordion (general-specific-general cycle of merchandise lines), the Wheel of Retailing (entry, trading-up, vulnerability phases), the Retail Life Cycle (birth, growth, maturity, decline stages), and the Polarisation Principle (relationships between large and small institutions) (Brown, 1987).

Conflict theory is based on inter-institutional conflict and relates to institutional innovation, power and the development of increasingly diverse retail structures. An example is the crisis-response model, which purports that retail institutions experience change in response to a competitive threat (Brown, 1987).

Combination theories are also applied to retail, resulting in some understanding that "retail change is the outcome of external environmental influences and a cycle-like

sequence of internal conflict” (Brown, 1987, p. 28). These theories explain prevalent responses to threat and change in the retail management field, however, they do not focus on the agency of specific actors or the origins and reasons for institutional creation or maintenance (Brown, 1987; Markin and Duncan, 1981). Empirical studies featuring these retail theories, therefore, focus on their predictive capacity and on determining repetitive patterns, and do not utilise an institutional lens to examine occupational change in retail management.

Studies of management education have used an institutional theory lens, including the seminal work by Meyer and Rowan (1977) to examine questions about the organisation and effects of curricula and research practices. In relation to retail management education, Shim et al.’s (1999) study uses socialisation theories to predict retail career preferences and choices. They surveyed US college students and queried the magnitude and nature of socialisation factors on their preferences and choices. Their study identifies three dimensions of retail career preference (extrinsic, intrinsic and lifestyle aspects) that influence perceptions of the legitimacy of retail management careers.

The preceding sections present a review of theoretical and empirical research underpinning and informing the formulation of this study. The following section discusses the insights that were generated and the resulting objectives, conceptual framework and research question.

2.13 The Formulation of Research Objectives, Conceptual Framework and Research Question

This review of research assesses how researchers have examined issues and questions about discursive institutionalisation and undergraduate degree development processes. The purpose of this thesis is to understand how discursive processes constitute the institutionalisation of an innovative collaborative practice of undergraduate degree development. This review, therefore, has presented significant insights about these processes and has shaped the formulation of objectives for this study. These insights are organised into three categories: 1) insights about theories of discursive institutional processes, 2) insights about empirical studies of collaborative and innovative institutionalisation processes of undergraduate degree development, and 3) insights about the application of discursive institutional work theories in research analytic processes. These categories of insights correspond to three objectives which formulate the outcomes of the study, and inform the formulation of its research question.

The first category of insights is about the discursive processes associated with the institutionalisation of innovative collaborative practices. Models of institutionalisation processes have featured discursive collaboration and have identified related antecedents, dynamics and outcomes of these processes (Maguire, 2004; Lawrence et al., 2002; Lawrence et al., 1999). Likewise, discursive models of institutionalisation have explained the characteristics of and the relationships between discursive dimensions which constitute institutionalisation processes (Phillips et al., 2004). However, these models do not explain how the particular characteristics of fields, their constituent collaborations and the collaborations' discursive work specifically

interact with institutionalising processes. As a result, there is a gap in research that theorises how discursive processes are mobilised in fields by collaborations engaged in developing new institutional practices.

In particular, whereas researchers have examined the temporal nature of innovational development processes (Garud et al., 2013; Van de Ven and Poole, 2005; Orlikowski and Yates, 2002), there have also been calls for research investigating the nature of the discursive generation of temporal processes (Garud et al., 2013). This review therefore shows that discursive institutionalisation processes have not been examined in terms of the dynamics of recursive, temporal, meso-level purposive actions.

This study therefore aims to expand knowledge about the processes associated with purposive discursive actions by investigating the patterns in the discursive institutional work actions performed during the development of a new institutional practice. The resulting objective is to:

Develop a discursive model of institutionalisation processes by specifying the conditions in which it may provide explanations.

The second category of insights is about empirical studies of collaborative and innovative institutionalisation processes of undergraduate degree development.

This review demonstrates that qualitative empirical studies can contribute to understanding the complexities of collaborations involved with innovative institutional work (see Appendix A, Table 2.2). However, this review has determined that particular research areas that relate to this aim have remained unexamined by previous studies. For example, of the seventy studies which examine IW listed in

Appendix A, Table 2.2, only twelve investigate collaborative processes and none are focused on undergraduate degree development.

Whilst Hargrave and Van de Ven's (2006) collective action model provides a way to understand how institutionalisation occurs through the purposive action of disparate actors, their focus is on the confrontational relationships between antagonists, as is Zietsma and Lawrence's (2010) study of the British Columbia forest industry.

However, this study will examine the complexities of the relationships involved with collaborative action, and it will focus on collaborations between institutionalised public actors and embedded corporate actors who have not previously collaborated and, although they are competitive, are protagonists. In addition, whilst researchers recognise that actors transcend public and private organisational structures, studies have tended to focus on collaborative actions that emerge around social movements (Van Wijk et al, 2013; Lounsbury et al., 2003; Rao et al., 2000) and technological innovations (Garud et al., 2002; Leblebici et al., 1991) rather than commercial service sectors, which are the focus of this empirical investigation.

This review identified studies which provide explanations about how particular institutionalising processes at the field level are constituted by various influences (Bartlett et al., 2007; Lounsbury, 2007; Oliver, 1991). In particular, researchers have called for empirical studies that investigate how these institutional processes are initiated in emergent fields (Greenwood et al., 2009) and particularly how they are collectively initiated (Dorado, 2005).

The review also identified empirical studies that elucidated the importance of examining the particular influences of local institutional norms and actions on the development of institutional practices (Marquis et al., 2013, Marquis and Battilana, 2009; Lounsbury, 2007). In particular, the strategic action field theory provides a framework for examining the formation of purposive, localised collaborations and their innovative actions (Van Wijk et al., 2013; Cooney, 2012; Fligstein and McAdam, 2011), which is in keeping with this study's focus on collaborative degree development in a localised occupational field (i.e. the Canadian retail management education field).

However, there are two facets of the formation of strategic action fields and their interactions with institutionalisation processes, that remain unexamined and that are relevant to this study's empirical investigation. The first unexamined facet is about the particular characteristics of fields which are constituted by institutionalised actors and corporate embedded actors from a consumer service sector, like retail management. Previous studies of strategic action fields have examined collaborations with institutionalised, embedded actors (Fligstein and McAdam, 2011), with similar groups of embedded actors situated in different locales (Cooney, 2012), and with social movement challengers and incumbent or embedded actors (Van Wijk et al., 2013; Özen and Özen, 2011). However, this review did not discover any empirical studies examining the particular characteristics and dynamics evident in a strategic action field comprised of institutionalised and corporate embedded actors from a consumer service sector.

The second unexamined facet of fields is about how particular cultural and contextual influences interact with institutionalisation processes. Empirical studies investigating how endogenous and exogenous influences interact with a strategic action field provide a way to examine the actions of interorganisational actors with localised norms and laws (Marquis and Battilana, 2009). However, there is a paucity of empirical studies of strategic action fields which examine how the interplay between exogenous and endogenous influences precipitates the initial stages of innovative institutional development in particular fields.

Previous research has considered how important focal issues are to the ways that fields develop (Jones, 2001; Leblebici, 1991) including the convergence of disparate actors around diverse issues (Hoffman, 1999). However, there is a lack of empirical examinations of how particular discursive processes used by specific collaborations interact in the process of framing and mobilising actions related to generalised issues.

This review also discovered a scarcity in studies of the interplay of interorganisational actors' discursive institutional work throughout an institutionalising process. In particular researchers have called for empirical studies of institutional work occurring in context and involving corporations (Suddaby, 2010). Although this review shows that Lawrence and Suddaby's (2006) typology of institutional work actions has been used to examine convergences of the multiple forms of work (see Appendix A, Table 2.2), the particular nature of how these IW actions are discursively performed in a commercial service sector has not been addressed. Furthermore, this review shows that institutional work theory (Lawrence and Suddaby, 2006) has not been used to examine simultaneous convergences of multiple forms of IW performed by

interorganisational collaborations featuring corporate actors doing discursive boundary work. Therefore, this empirical analysis aims to investigate the particular discursive institutional work of interorganisational collaborations doing boundary work in a strategic action field constituted by institutionalised public sector and embedded corporate sector actors.

Studies about collaborations related to corporate-university partnerships have not focused on the specific institutional and discursive work involved with the emergence of a new practice of degree development. Whereas studies of industry-university collaborations have produced phased models explaining related processes (Buys and Bursnall, 2007), there have not been studies which have examined issues of process, agency and meaning in collaborative undergraduate degree development. Neither have there been studies about industry-university collaborations set within a particular consumer service sector. In particular, researchers have called for empirical studies that examine the genesis of organisational practices and actions that instantiate the legitimacy of industry involvement with university processes like degree development (Powell and Colyvas, 2008; Colyvas and Powell, 2006).

This review also reveals a gap in empirical examples of discursive legitimation through professionalisation. Whilst researchers have examined specific professionalising influences in service sectors (Thomas and Thomas, 2014; Watson 2002), there have not been empirical studies of specific professionalising processes focused on the retail sector. In particular, whilst researchers have identified that the development of specific educational requirements is central to the professionalisation of managerial occupations (Muzio et al., 2011, Arndt and Bigelow, 2005), there have

not been empirical studies about the interactions between undergraduate degree development and professionalising processes in the retail sector.

This review, therefore, shows that there have not been empirical examinations of the dynamics of interorganisational collaborations performing discursive institutional work in an emergent strategic action field. In particular, there have not been examinations of the specific work performed in the development of a degree for the purposes of professionalising an occupation. As a result, this study aims to accomplish the following objective:

Investigate a collaborative practice of undergraduate degree development in an emergent strategic action field, which constitutes an innovative institutionalisation process.

The third area of insights is about the application of discursive institutionalisation work theories in analytic processes. Discursive models of institutionalisation have examined the relationships between discursive dimensions which constitute institutionalisation (Phillips et al., 2004). However, these models do not explain how the particular characteristics of fields, their constituent collaborations and the collaborations' discursive work specifically interact with institutionalising processes.

Furthermore, this review has identified several models which elucidate particular characteristics of discursive institutional work processes. However, these models have not been coordinated for the purpose of analysing these processes. This study aims to apply the mechanisms of Fligstein and McAdam's (2012, 2011) theory of strategic action fields to this analysis of the retail management education field. In addition, it will apply Rowley's (1997) notion of stakeholders' centrality to the analysis

of the resources provided by collaborating actors. The dimensions of Hardy et al.'s (2005) and Lawrence et al.'s (2002) models will also provide ways to analyse collaborations. Phillips et al.'s (2004) discursive model of institutionalism will provide a way to view characteristics of discursive themes and Maguire's (2004) model of different genres of texts will provide a lens for analysing the nature of institutionalising texts. In addition, the specific legitimation strategies utilised throughout discursive work will be based on the categories developed by Van Leeuwen (2007). Whilst Scott's (2001) determination of the nature of three pillars of institutions (i.e. regulative, normative and cultural-cognitive elements) will provide a way to categorise these elements, the specific aspects of professionalising work will be analysed through Muzio et al.'s (2011) model (see also Arndt and Bigelow, 2005).

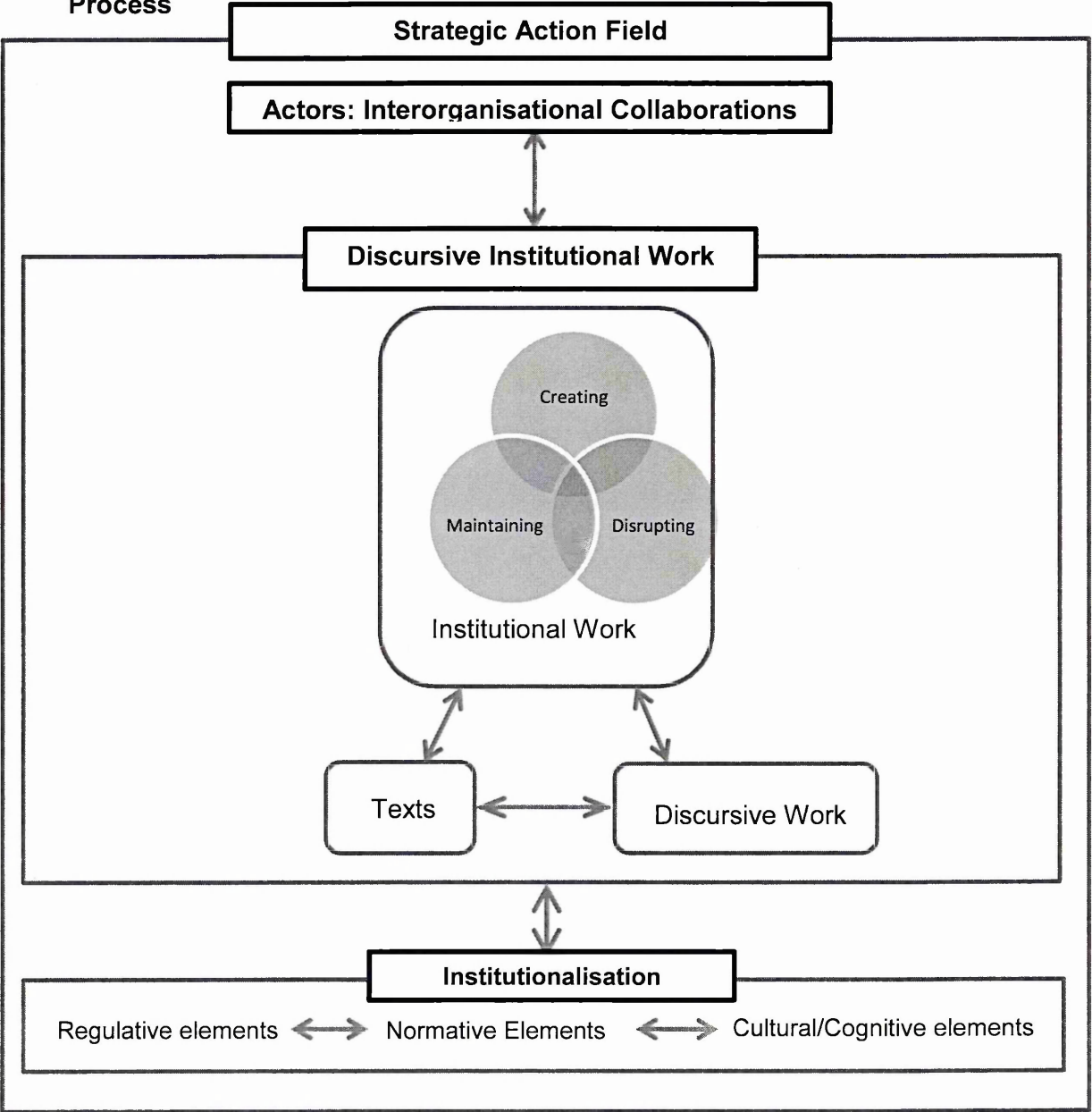
In particular, although studies have used the categories in Lawrence and Suddaby's (2006) typology of types of institutional work to analyse institutionalisation (see Appendix A, Table 2.2), none have operationalised these categories in a discursive analysis of collaborations in a strategic action field. However, this study aims to operationalise their typology of institutional work (Lawrence and Suddaby, 2006) through a discursive model of institutionalisation and apply it to data produced in a case study. The resulting objective is to:

Establish a case study research methodology that applies discursive institutional work (DIW) analytic processes.

Figure 2.1 portrays a conceptual framework of the elements that constitute the accomplishment of these three objectives. It portrays the dimensions of strategic action fields, interorganisational actors, discursive institutional work and institutionalised elements which constitute an integrated, recursive model of

discursive institutional work (DIW). The framework is described in the section following Figure 2.1.

Figure 2.1 Conceptual Framework of Discursive Institutionalisation Work Process



Source: Developed for this Study

This framework of discursive institutional work processes (Figure 2.1) depicts how this study will accomplish the study’s research objectives. The processes are

situated in a strategic action field, which is comprised of multiple interorganisational collaborations featuring public institutionalised and corporate embedded actors. These collaborations perform discursive institutional work (DIW) that is comprised of multiple forms of the three types of institutional work actions, patterns of discursive work, and genres of texts. This DIW thereby constitutes the three elements of institutionalisation – regulative, normative and cultural/cognitive elements. The combination of dimensions in this framework provides a heterogeneous view of the discursive and institutional elements that are involved with an innovative degree development process.

The resulting analysis will provide an understanding of the discursive processes that constitute the institutionalisation of an innovative collaborative practice of undergraduate degree development. This understanding will provide the answer to the focal research question for this study:

How do discursive processes institutionalise an innovative practice of retail management degree development?

The next Chapter provides the first of two chapters devoted to explaining this study's methodological approach, which operationalises the conceptual framework presented in Figure 2.1. This approach also establishes how the study's objectives will be accomplished and, therefore, how the answer to the research question will be derived.

Chapter 3: Methodology I - Developing the Analytical Framework

3.1 Introduction

This study's methodological approach needs to capture and analyse a rich and varied set of data sources. Given the diversity of the data sources and the nature of the research objectives, it is important to adopt a method of analysis that will enable investigation and explanation of the nature of an institutionalisation process.

Furthermore, a method is sought that will operate with the discursive institutional work conceptual framework. As a result, discourse analysis is selected as the methodological approach. The particular method combines organisational discourse analysis and institutional work theory. This method is used to investigate how the collaborations in the ESR case used discursive institutional work throughout the degree development process.

This discussion of the methodological approach is presented in two parts. This chapter presents the rationale that underpins the selection of the approach, as well as the discussion of the linkages between the conceptual framework and the methodology, and of the practicalities, opportunities, and limitations of the approach. This chapter is followed by Chapter Four, which presents the design and justification of the case study investigation and explains the data collection and analytic strategies used. Chapter Four also discusses the validity and reliability measures used throughout the analysis, and features a reflective discussion of the decisions made throughout the analysis, the ethical considerations of participants, and the role of the researcher.

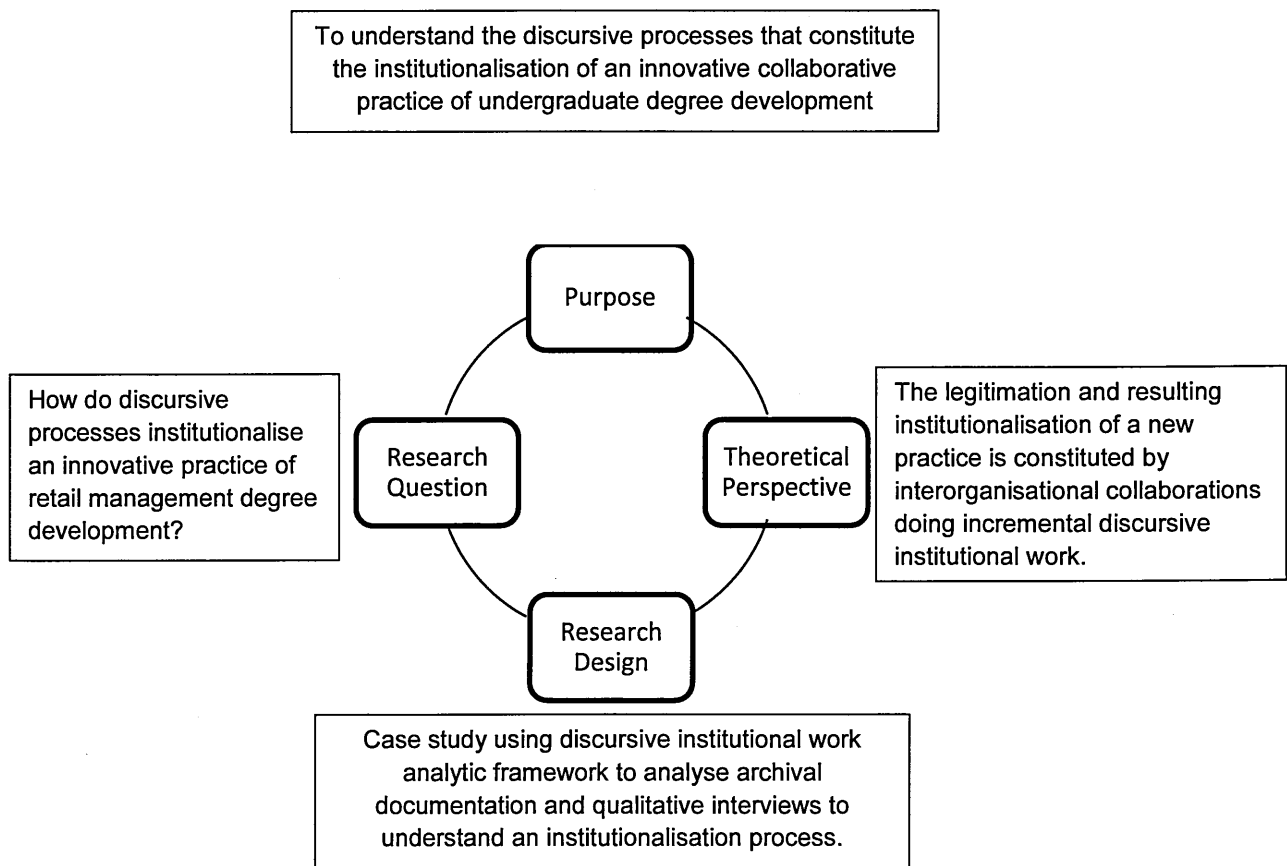
This chapter begins with a statement of this study's purpose and resulting research question. The remainder of this chapter is divided into four sections: Section one discusses the philosophical perspective for the methodological choice. More specifically, the section examines the ontological and epistemological perspectives that underpin this investigation. Section two discusses the methodological approach and justifies how the chosen approach, Organisational Discourse Analysis (ODA), is suitable for this study. Section three details the methodological framework used to shape the data analysis, which draws on the dimensions of several theoretical models, including Institutional Work (IW) theory (Lawrence and Suddaby, 2006) and the Discursive Model of Institutionalism (DMI) (Phillips et al., 2004). Section four summarises the chapter and links to the second part of the discussion of the methodological approach featured in Chapter Four.

As a result, the work presented in this chapter enables the thesis to move from the conceptual phase discussed in Chapter Two, to the related justification of the analytic method, and then towards its practicalities which are presented in Chapter Four.

The rationale for choosing Organisational Discourse Analysis (ODA) as the methodological approach to inquiry follows Schwandt's (1997, p. 93) definition of methodology, which is "the theory of how inquiry should proceed. It involves analysis of the principles and procedures in a particular field of inquiry that, in turn, govern the use of particular methods". The particular field of inquiry is discursive institutionalisation, and, specifically, the discursive institutionalisation of a new practice of undergraduate degree development. Therefore a discursive analytic method is used to provide in-depth knowledge about how the field of inquiry

underwent discursive institutionalisation. Specifically, this study operationalises a typology of institutional work (Lawrence and Suddaby, 2006) through a discursive model of institutionalisation and applies it to the texts and discursive themes produced in the case study. The key aspects of this thesis are depicted in Figure 3.1

Figure 3.1 Key aspects of this study



Source: Developed for this study

The purpose of this study is to understand the discursive processes that constitute the institutionalisation of an innovative, collaborative practice of undergraduate degree development. In order to accomplish this purpose, this study answers the research question:

How do discursive processes institutionalise an innovative practice of retail management degree development?

The following research objectives have been determined:

1. Develop a discursive model of institutionalisation processes by specifying the conditions in which it may provide explanations.
2. Investigate a collaborative practice of undergraduate degree development in an emergent strategic action field, which constitutes an innovative institutionalisation process.
3. Establish a case study research methodology that applies discursive institutional work (DIW) analytic processes.

These objectives are predicated by philosophical perspectives about the type of approach suitable for determining the nature of the reality being investigated. The discussion of the philosophical perspectives is an important starting point as it provides an overarching direction for the practical work undertaken in the analysis. The following section discusses the ontological and epistemological perspectives that provide the foundation for the methodological approach of this study.

3.2 Methodological Perspectives: Ontological and Epistimological

Underpinnings

In order to understand how to approach this investigation, it is important to clarify the underlying beliefs about the nature of the reality being examined. These beliefs reflect the ontological perspective of this thesis.

The ontological belief underpinning this study is that the reality of the degree development should be viewed as a process, meaning that it is constituted by varied and fluctuating actions. This process view provides a way to understand institutional change as being related to how processes develop and to how things (i.e. degrees)

are reifications of processes which are constructed through interaction (Langley et al., 2013). By recognising that processes are not static or singular realities, the ontological view is that processes are made up of multiple processes, events, and experiences, which mutually constitute other events (Langley et al., 2013).

Institutionalisation processes are inherently dynamic. Furthermore, in the course of becoming practices, processes are influenced by actors' social experiences. Consequently, the reality of the degree development work is made up of the multiple, socially constructed realities of the interorganisational actors involved. The current study therefore emphasises the versions of reality that are held by the multiple actors involved with the discursive institutionalising work, and that result from the actors' discursive actions (Creswell, 2003; Mason, 2002).

These processes are socially and discursively constructed by collaborative actors and are situated in a particular organisational setting. By taking a process perspective, this study needs to be able to explain the generative mechanisms that influence how these processes develop and to identify the particular circumstances in which they operate. Furthermore, it needs to be able to identify the discursive resources that the actors draw upon in distinct ways, for certain purposes and in the context of particular activities (Sandberg and Tsoukas, 2011).

This study's epistemological view, which is the perspective about how knowledge of reality can be observed, is aligned with the ontological view. The epistemological view is that knowledge of the collaborative processes is derived from the discourses produced and presented by the interorganisational actors involved (Mason, 2002).

The evidence of the development processes is found in the historical, archival documentation and interviews presented in the ESR case. Therefore, the concepts developed through this study will have a particular shape, drawn from the specific context of the case, and they will encapsulate the distinct ways, purposes and context of particular activities (Sandberg and Tsoukas, 2011).

This study is therefore positioned in the interpretivist research tradition, which centres on understanding how people make sense of and attach meaning to their own reality (Weber, 1968). The reality of the retail degree development practice is socially and discursively constructed, and the current study focuses on understanding the related social behaviour, rather than explaining it. Thus, the focus is on the discursive characteristics that constitute degree development work and not on the acceptance or impact of the outcome of the process.

Aligned with the philosophical underpinnings of the research, this study uses a qualitative research design, which features a discursive methodological approach. The following section discusses the rationale for this qualitative approach and then provides a discussion of the reasons for using Organisational Discourse Analysis (ODA) as the particular approach to this study.

3.3 Methodological Approach

The decision to use qualitative research methods is predicated on the qualities of this study's philosophical underpinnings, purpose, research question, and theoretical perspective (see Figure 3.1). The thesis thereby exhibits the following research

qualities, which are characteristic of research designs that justify the use of a qualitative approach (Creswell, 2006).

This study is oriented to understanding the complexity, detail and context of the processes that constitute a new institutional practice. This process perspective requires that the explanation includes consideration of a sequential structure, focal actors, a point of view, a consideration of cultural values and contextual influences (Pentland, 1999). Therefore, the research warrants the use of a holistic method of inquiry which allows for viewing multiple aspects of the ESR case data through a multi-faceted lens, as provided by qualitative research methods.

This study is empirical in nature and therefore research techniques suited to naturalistic observations and language are useful. In particular, qualitative research methods accommodate the vagaries of naturalistic data, as found in the ESR data.

Because this study draws upon different versions of the same processes, it is interpretive in nature and a qualitative method provides a means for aggregating these different versions of reality. The research is emergent, flexible and contextual rather than tightly prefigured, and therefore requires a qualitative research approach that is inherently flexible.

The analysis incorporates the researcher's reflexivity, as she was a participant in the ESR process (see Sections 4.8.2 and 4.9.2 for descriptions of the Intellectual (Reflexive) Audit Trail and of the Researcher's Role). Qualitative methods provide a way to consider the contributions and nuance afforded by such a reflexive orientation.

Finally, a qualitative approach furthers understanding and provides a thick description of the complex interrelationships involved with the processes presented in the case (Creswell, 2003; Mason, 2002; Stake, 1995).

Keeping with the study's interpretivist ontological and epistemological grounding, the methodological approach needs to discern and analyse the discourses that are constitutive and constructive of reality, rather than reflective or representative of reality (Phillips and Oswick, 2012; Hardy et al., 2005; Chia, 2000). This approach needs to delineate selected discursive elements of the development process and identify them so that it is possible to "talk about them as if they were naturally existing social entities" (Chia, 2000, p. 514). In addition, the approach needs to highlight the process of organisation and the ways that discourse created, maintained, and disrupted the organising process.

Organisational discourse analysis (ODA) provides the qualitative research techniques necessary to examine the socially-constructed processes (Phillips and Oswick, 2012). The following section provides a discussion of the ODA approach and its applicability to this study's analytical approach.

3.3.1 Organisational Discourse Analysis (ODA)

Organisational discourse analysis (ODA) provides a useful theoretical framework, and a practical methodological approach to examining the role of discursive processes in institutional development (Phillips et al., 2004). ODA is a research methodology based on an interpretivist epistemology and is, therefore, aligned with the

underpinnings of this study (Phillips and Hardy, 2002; Hardy, 2001). ODA is particularly oriented to illuminating the processes through which organisational realities, like the degree development practice, are developed in discursive processes (Phillips and Oswick, 2012). The analysis of organisational discourse provides a way to know about organisational realities through an interpretivist epistemology (Phillips and Hardy, 2002).

As the project's methodological approach, ODA is used to analyse the data presented in a unique case. The rationale for utilising ODA is presented below, followed by a discussion of the theoretical assumptions about ODA that underpin the methodological approach of the study. This discussion focuses on three concepts that are featured in the approach: discourse, texts and context. Then the section presents a review of ODA research literature according to forms of empirical foci.

3.3.1.1 Theoretical Assumptions of Organisational Discourse Analysis

ODA analyses the significance of discourse, particularly to the "bringing into existence of an 'organized' or stabilized state" (Chia, 2000, p.514). This current study examines the significance of the discourses that brought the degree development process into an organised, institutionalised state. In this case, that institutionalised state was constituted by three discursive dimensions of the degree (Scott, 2001):

1) regulative discursive dimensions. The regulative institutional dimensions relate to government requirements for university funding and degree granting. These dimensions also include Ryerson's existing and emergent degree granting procedures and requirements.

2) *normative discursive dimensions*. The normative institutional dimensions include the integration of developmental collaborations and innovative curriculum content and delivery in the degree development process.

3) *cultural-cognitive discursive dimensions*. The cultural-cognitive institutional dimensions refer to legitimative discursive strategies utilised in the process. In particular, these dimensions constitute managerial professionalisation of retail management as a career via the innovative degree development process (Muzio et al, 2011; Evetts, 2011, 2006; Arndt and Bigelow, 2005). These dimensions include claims to a specific occupational jurisdiction (i.e. retail management as a career), a specific body of retail management knowledge (i.e. degree content, research capacity) and specific educational requirements (i.e. occupational standards, certificate and degree requirements).

Rather than trying to interpret social reality as it exists, ODA research focuses on the constructive effects of texts, and on how social reality is created through historically situated discursive elements (Fairhurst and Uhl-Bien, 2012; Fairhurst and Putnam, 2004; Alvesson and Kärreman, 2000b)

Specifically, organisational discourse focuses on the ways that organisational actors work with discourse, and thereby produce social realities consisting of discursively constituted objects and ideas. ODA does not consider an organisation to be an existing social object; rather, ODA suggests that discursive processes form organisations as social objects (Fairhurst and Uhl-Bien, 2012; Chia, 2000).

Discourses can constitute realities by producing identities, contexts, and procedures, which then lead to particular practices (Paroutis and Heracleous, 2013; Hardy, 2001).

An example is the discourse of organisational strategy, which has produced organising procedures like strategic planning. In turn, these procedures have formed business practices (Knights and Morgan, 1991). Another example is the discourse of AIDS which has established the concept of a patient-activist as a new organising collective identity (Maguire et al., 2001).

Discursive studies help to understand institutional and organisational phenomena in several ways (Grant and Marshak, 2011; Grant et al., 2004). Firstly, ODA research studies conceptualise institutions and organisations as discursively constructed collections of texts, and, therefore, they focus on language use as the central object of study (Grant and Marshak, 2011; Fairhurst and Putnam, 2004; Hardy, 2001). Secondly, the study of organisational discourse examines how organisational actors produce social realities consisting of discursively constituted objects (Grant and Marshak, 2011). As stated by Hardy et al., (2005, p.59), "A discursive approach to organisational phenomena is more than a focus on language and its usage in organisations. It highlights the ways in which language *constructs* organisational reality, rather than simply reflecting it". Thirdly, ODA studies show how discourses are based on socially constructive processes that involve different organisational actors (Hardy et al.2005; Phillips and Hardy, 2002).

Approaches to using ODA as a methodology vary according to differing perspectives about the relationships between discourses produced by organisations and the social reality that organisations portray (Hardy and Grant, 2012; Keenoy et al., 2000; Mumby and Clair, 1997; vanDijk, 1997). These differing perspectives of

organisational discourse are categorised into three categories by Putnam and Fairhurst (2004):

- 1) organisations are already formed objects, and their characteristics are reflected in the organisational discourse;
- 2) organisations are in a state of becoming through the formative ways discourse shapes organising, and
- 3) organisations are grounded in action and discursive forms.

This study is oriented to the third perspective. For example, texts can be viewed as providing structure that connects discourse to organising elements, like organisational processes, procedures and practices (Taylor and Van Every, 2000). Discourse can also provide structuring patterns that shape organising elements, which then form texts (Fairhurst and Putnam, 2004). This study is thereby informed by Giddens' (1979) structuration theory, which argues that structure (i.e. requirements, rules and resources) is the both the medium and outcome of social action, and can enable and also constrain organising actions (Fairhurst and Putnam, 2004).

The Knights and Morgan (1991) strategy discourse analysis is an example of grounded in action research. They show how discursive effects shape organising elements, like strategic planning processes, which then shape the texts produced by strategic planning business practices. The grounded in action view also asserts that underlying, organising processes provide a collection of associated organisational objects and that interorganisational actors can therefore speak on behalf of the resulting organisation. Maguire et al.'s (2001) research on the discourse of AIDS shows how discourse contributes to the development of collective identities, which

provide a basis for collective actors to participate in AIDS organising processes.

Likewise, this ESR study claims that the discourses involved with the degree development processes simultaneously a) constituted its resulting characteristics, including specific retail skills and knowledge, and b) constrained what those characteristics would be, including how many courses constitute a degree.

In adopting the grounded in action view, this study utilises a meso-discourse approach that goes beyond texts and identifies patterns and interrelations between texts and their context (Paroutis and Heracleous, 2013, Alvesson and Kärreman, 2000a). This approach assumes that discourse constitutes organisational actors' meanings and also influences their practices (Paroutis and Heracleous, 2013; Heracleous and Barrett, 2001). An example of this approach (drawn from the ESR case) is how the interorganisational actors used discourse drawn from traditional university and government degree requirements to reconstitute the institutionalising dimensions of the process. Both traditional and emerging organising elements associated with university degree requirements enabled the interorganisational collaborations' participation in the degree's discursive development.

Three concepts central to organisational discourse are central to this study's discursive approach to analysing institutionalisation. The concepts are discussed in the following section.

3.3.1.2 Key Concepts of Organisational Discourse Analysis

The nature of the a) discourse, b) text and c) context are integral to an ODA methodological approach.

a) *Discourse*. This analysis adopts the definition of discourse as a set of interrelated texts that, along with the related practices of text production, distribution, and consumption, brings an object or idea into being (Paroutis and Heracleous, 2013; Hardy et al., 2005; Fairclough, 1995; Parker, 1992). This study specifically examines institutionalising patterns amongst discursive elements, including how they are structured, coherent, and supportive or contradictory (Phillips et al., 2004).

b) *Texts*. Discourse can only be explored by the texts that constitute them (Phillips et al., 2004; Fairclough, 1992; Parker, 1992). This study uses Grant et al.'s (2001) definition that texts might include written or spoken language, and visual representations. ODA involves consideration of the complex relationships among sets of texts and the various devices within the texts that describe and constitute organisational realities (Grant and Marshak, 2011; Phillips and Hardy, 2002; Heracleous and Barrett, 2001). Organisational discourse research centres on the texts that compose, and are composed in and by, organisations (Paroutis and Heracleous, 2013; Hardy, 2001). ODA research examines patterns in the production, distribution and consumption of texts to understand organisations and institutions (Hardy, 2010). This ESR study examines the production, distribution, and consumption of texts to understand the discursive processes that brought upon institutionalisation of the degree development process, which is the discursive object in the case (Phillips et al., 2004; Parker, 1992).

c) *Context*. Discourses do not exist or possess meaning without context; meanings are affected by the production, distribution, and consumption of texts, and originate from the social interactions and structures in which the discourse is embedded. In

order to understand how meaning is affected, ODA locates discourses' context, both historically and socially (Grant and Marshak, 2011; Hardy et al., 2005; Fairclough and Wodak, 1997). Context may be constituted by intertextuality and interdiscursivity (Sillence, 2007; Fairclough and Wodak, 1997; Fairclough, 1992). Intertextuality (how texts are connected to other texts) occurs when other texts are explicitly drawn upon within a text. Interdiscursivity (how texts are constituted from diverse discourses) occurs when a discourse type is constituted through elements of other discourses including concepts, objects and theorising (Munir and Phillips, 2005).

This ESR study investigates a particular organisational reality in a specific time and space. The unique case is situated in a particular time when a university and a major Canadian retailer formed a partnership from which the country's first retail management degree originated. ODA situates texts and their related discourses within particular historical and social contexts and is, therefore, suited to examining this particular reality of an innovative degree development practice (Cederstrom and Spicer, 2013; Selsky et al., 2003; Fairclough 1992).

Whereas ODA provides a suitable methodological approach for this analysis, its operationalisation can utilise a variety of analytical methods. The following section evaluates how these methods have been used in ODA studies, in order to justify the methodological approach in this study.

3.3.2 Forms of Organisational Discourse Analysis Studies

Organisational discourse analysis is a collection of methodological approaches to discourse that includes different practices of data collection and analysis. A variety of

discourse analysis approaches have been reported in research literature, including conversation analysis, critical discourse analysis, and narrative analysis (Phillips and Oswick, 2012; Grant and Iedema, 2005; Putnam and Fairhurst, 2001).

The various approaches to discourse analysis have three different foci (Phillips et al., 2004), which are categorised according to forms of discourse patterns, forms of discourse evidence, and forms of organisational phenomena. A discussion of these categories is presented in the following section

3.3.2.1 Forms of Discourse Patterns

Wetherell et al. (2001) categorises four ways to view discourse patterns including a) systems of patterns, b) interactions, c) topics or activities, and d) a wider cultural and societal system. Table 3.1 presents a summary of the approaches and categorises the related methodological approaches, the purpose of the approaches, and exemplary studies. The discussion following the table evaluates how the four models relate to this study’s methodological approach.

Table 3.1: Discourse Analysis Approaches related to Forms of Discourse Patterns

Looks for patterns in...	Methodological Approach	Purpose: Discourse is analysed for...	Exemplary Studies
a) Systems of Patterns	Narrative Analysis	How it arranges events into meaningful order, i.e. plot structure, character development, events’ emotional impact	Rojas, 2010; Angus, 1993
	Discursive devices analysis	The linguistic styles, phrases, figures of speech central to developing a compelling story.	Whittle et al., 2008
b) Interactions	Interpretative Repertoire Analysis	What social reality it constructs and what social (or ideological) actions it performs/achieves	Riaz et al., 2011; Whittle et al., 2008
	Conversational Analysis	How interactional order is maintained, i.e. turn-taking, repair, mechanisms	Zilber, 2002

Looks for patterns in...	Methodological Approach	Purpose: Discourse is analysed for...	Exemplary Studies
c) Topics or activities	Realist	A 'true' and accurate source of information or 'reflection' of past events, attitudes, beliefs.	Slager et al., 2012; Reay et al., 2006
d) A wider cultural and societal system	Critical Discourse Analysis	A medium and outcome of wider institutional power struggles i.e. Reproduction of economic, political inequalities	Vaara and Tienari, 2008; Maguire et al., 2004
	Organisational Discourse Analysis	The social/ organisational reality affected by production, distribution, consumption of texts.	Phillips et al., 2004

Source: Developed for this study

a) *Discourse as a System of Patterns.* When discourse is viewed as a system, ODA investigates patterns related to the system. For example, Angus' (1993) examination of the gender-related patterns in the procedures, customs, and routines within an Australian Christian Brothers College views the related discourse as a system of gender-oriented discursive elements. Although this examines the systematic production of texts and related discursive patterns, it also examines the wider cultural/societal system of the university.

b) *Discourse as Interactions.* When discourse is viewed as a process, ODA focuses on the interactions in the use of discourse. An example is Zilber's (2002) study of meetings in an Israeli rape crisis centre where there was a shift in institutional logic from a feminist to a therapeutic logic. The shift in logics (see Section 2.8.1) is analysed through the discursive interactions during meetings which show how turn-taking and meeting mechanisms constituted the shift. Although this current study is focused on the influence of the wider cultural and societal system, it also focuses on the interplay of related texts and discursive themes.

c) *Discourse as per Specific Activities.* When discourse is viewed according to a given topic or activity (e.g. legal discourse, psychotherapeutic discourse), the emphasis is on discourse patterns within the topic. For example, Slager et al.'s, (2012) study focuses on the specific topic of investment and the related discursive development of an Investment Index and standard practice within investment activity. This ESR study, however, adopts multiple views of a degree development practice (i.e. as an education discourse and as a retail industry discourse).

d) *Discourse as per a Wider Cultural and Societal System.* When discourse is viewed as part of major processes and activities, ODA looks for patterns within social and cultural contexts, and goes beyond language. For example, Hardy et al.'s (2005) study of the development of HIV/AIDS treatment advocacy examines patterns within the Canadian context. The nature of the collaborations in their study was also discussed in Section 2.5.2 and their research examines related social and cultural implications. Of particular note to this current study, is Phillips et al.'s (2004) model of the organisational discursive elements involved with institutionalisation. The ESR study's methodological approach uses aspects of this model to examine the social context involved with the degree development process. In particular, this study refers to the Phillips et al. (2004) model's conceptualisation of the roles of

- legitimacy,
- actors' field characteristics,
- the genres of texts,
- the structure and coherence of discourses, and
- the presence of supporting and competing discourses.

3.3.2.2 Forms of Discourse Evidence

ODA research approaches can differ by the form of discourse evidence they examine.

In particular, some projects focus on the analysis of particular types of texts as empirical evidence for particular discourses (Grant and Iedema, 2005; Phillips and Hardy, 1997). For example, in Goodrick and Reay's (2010) examination of the legitimization of nurses' identity, their primary unit of analysis is nursing textbooks.

Messeghem and Fourquet-Courbet (2013) study legislative change in French mass retailing through the discursive examination of the weblog postings of a major French retailer.

ODA studies tend to use textual analysis to draw on historical documentation, when other data sources are not available (Hardy and Grant, 2012). An example is Maguire and Hardy's (2009) study of the deinstitutionalisation of DDT, which focused on events taking place across multiple organisations in the 1960s. The multiple actors were not available for interviews, the authors could not have participated ethnographically, and the empirical texts were only those that were archived.

Likewise, this current study recognises the significance of the organic, archival nature of textual evidence presented in the ESR documentation data (Rowlinson, 2004, 2001). In this case, one of the key organisational actors, Eaton's, has been bankrupt for over a decade, and representatives have retired or passed away. As a result, ethnographic and observational methods of evidence collection are not possible, conversations are not occurring, and electronic communication files do not exist. So the multiple textual forms of evidence, including speeches, proposals, reports, newspaper articles, and brochures presented in the archival documentation are

valuable means for providing insights into this unique process that would not be otherwise available.

3.3.2.3 Forms of Organisational Phenomenon

ODA research approaches are used in studies with empirical foci oriented to a range of organisational phenomena, including studies of change (Grant and Marshak, 2011), strategy (Knights and Morgan, 1991), leadership (Fairhurst and Uhl-Bien, 2012), communication (Putnam and Fairhurst, 2001), organisation studies (Grant and Iedema, 2005; Grant et al., 2004) and institutional theory (Lawrence and Suddaby, 2006; Phillips et al., 2004). Phillips and Oswick (2012) outline four areas where empirical studies utilising ODA have been particularly evident: a) identity, b) institutions, c) strategy, and d) organisational change. The following section discusses the range of organisational phenomenon featured in ODA studies, addressing the four areas outlined in Table 3.2.

Table 3.2: ODA Studies by Organisational Phenomenon (Source: Developed for this study. Adapted from Phillips and Oswick (2012))

Area	Empirical Focus	Studies
a) Identity	Social	Goodrick and Reay, 2010; Creed et al., 2002; Zilber, 2002; Maguire et al., 2001; Hardy and Phillips, 1999
	Organisational/ Corporate	Rao et al., 2003; Alvesson and Willmott, 2002; Lawrence et al., 2002; Lounsbury, 2002
	National	Jack and Lorbiecki, 2007
	Individual	Brown and Toyoki, 2013; Brown and Lewis, 2011; Creed et al., 2010; Ibarra and Barbulescu, 2010; Hardy and Phillips, 1999
b) Institutions	Social Construction of Institutions	Suddaby and Viale, 2011; Khaire and Wadhwani, 2010; Maguire and Hardy, 2009; Munir and Phillips, 2006; Lawrence and Phillips, 2004; Maguire, 2004
	Organisational processes	Empson et al., 2013; Reay et al., 2013; Yu, 2013; Hardy and Maguire, 2010; Phillips et al., 2004; Thornton, 2002
c) Strategy	Strategy as a Discourse	Paroutis and Heracleous, 2013; Ezzamel and Willmott, 2008; Mantere and Vaara, 2008; Vaara and Tienari, 2008; Knights and Morgan, 1995, 1991

Area	Empirical Focus	Studies
d) Change	Meaning construction	Grant and Marshak, 2011; Sonenshein, 2010; Suddaby and Greenwood, 2005; Heracleous and Barrett, 2001

a) Identity. ODA studies focus on the construction of identities under a variety of sub-themes including social identity, organisational or corporate identity, national identity, and individual identity. For example, Lawrence et al. (2002) study institutional work done through different modes of interorganisational collaboration in the development of proto-institutions (see Section 2.5.2). Their analysis rates the involvement and embeddedness dimensions of collaborations as having low, medium and high levels. This ESR study also investigates the construction of an organisational identity – the managerial professionalisation of retail management.

b) Institutions. Institutional research also utilises ODA in the investigation of the social construction of institutions and of institutional processes. Empson et al.'s (2013) study of the micro-dynamics of corporatisation uses the dimensions of IW theory as an analytical lens (see Section 2.8.4). In particular, they report evidence of simultaneous occurrences of different types of IW.

As noted earlier, Phillips et al.'s (2004) conceptual article provides this study with a number of dimensions for analysing discursive institutionalisation. Whereas their DMI analytic model identifies actions as events which subsequently lead to the production of texts, this study identifies actions as discrete discursive events – i.e. the actual production, distribution and consumption of texts are actions. The analysis then examines the type of institutional work to which the discursive actions are directed. Additionally, although many of the dimensions of the Phillips et al. (2004) model are

used in this study, the discursive institutionalisation process it presents is a linear, sequential process of institutionalisation. Conversely, this study investigates recursive and interrelated relationships, for which a linear approach is not helpful.

c) *Strategy*. Research on organisational strategy focuses on how strategy discourse is constructed and contributes to understanding the effects of power and the processes involved. In particular, Paroutis and Heracleous's (2013) study presents institutional development stages that relate dimensions of strategy discourse and IW. Their approach provides the inspiration for this investigation of the temporal phases of discursive institutional work done by the ESR collaborations.

d) *Change*. ODA is also used to study the processes of meaning construction and reconstruction involved with change research. Of particular note to the development of this current study's analytical framework is Grant and Marshak's (2011) discursive model of organisational change. They present an analytical approach oriented to iterative and interrelated processes, which is the approach used in this ESR study.

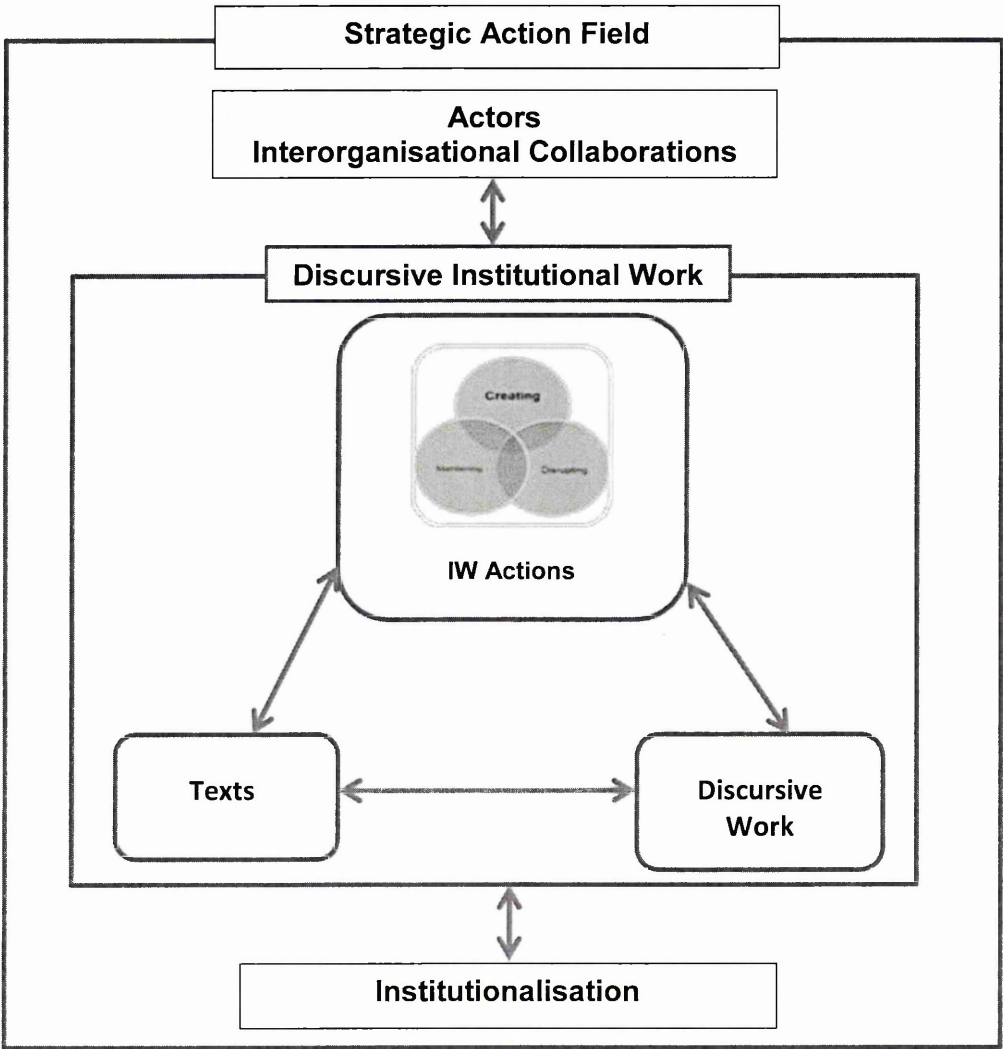
The preceding section presents the ways that ODA is a suitable approach for the investigation of an innovative process. The following section discusses how ODA is applied in the methodological framework used to analyse the ESR case study.

3.4 Methodological Framework

Other discursive models of institutionalisation (notably Phillips et al., 2004) integrate discourse analysis approaches with aspects of institutional theory. However, there are few studies that incorporate institutional work elements in a discursive

methodological approach to institutionalisation. As a result, there is a gap in the research oriented to developing and utilising methodological approaches that integrate the examination of the incremental discursive actions that constitute institutions. In response, this study merges features of organisational discourse analysis and institutional work theory (Table 3.3). The analytic framework thereby constitutes a discursive institutional work (DIW) analytical model (Figure 3.2).

Figure 3.2 Discursive Institutional Work (DIW): An Analytic Framework
(Source: Developed for this study)



The DIW model presents a case study method that applies a discursive IW analytic process with features that link the key features in ODA and institutional work theory and meet this study's research objectives. The DIW methodological model merges features of organisational discourse analysis and institutional work theory. The features are presented in Table 3.3 and discussed following the table.

Table 3.3 Key Features of Discursive Institutional work (DIW) Analytic Framework

Features	Organisational Discourse Analysis (ODA)	Institutional Work (IW) Theory	Discursive Institutional Work (DIW) Framework
a) Key research question	How is discourse organised, what is it doing?	How does institutional work occur when creating, maintaining, disrupting institutions?	How do discursive processes occur when creating, maintaining, disrupting institutions?
b) Theoretical aims	To understand the process of the social construction of reality through organisational discourse, the role of agency in this process	To theorise about how institutional work and the efforts associated with creating, maintaining, disrupting social practices affect institutions	To theorise how discursive processes constitute and construct institutional work.
c) Role of agency	Discursive activity carried out to influence processes of organisational construction	Actors (individuals and organisations) perform purposive work aimed at creating, maintaining, disrupting institutions	Actors accomplish institutional work through discursive processes
d) Role of processes	Discourse shapes, is shaped by organising and organisational outcomes	Creating, maintaining, disrupting are sets of activities, not accomplishments	Discursive institutional work processes are actions that constitute institutional development
e) Key Studies	Heracleous and Barrett (2001), Mantere and Vaara (2008)	Jarzabkowski et al., (2009) Greenwood and Suddaby (2006), Greenwood et al. (2002), Hardy and Maguire (2010), Maguire et al. (2004), Rojas (2010)	Liefoogh and Davey, 2010; Munir and Phillips, 2005; Phillips et al., 2004

Source: Developed for this study, Adapted from Paroutis and Heracleous (2013)

The key features of the DIW framework (Table 3.3) developed for this study include:

- a) *Research Question*. The key DIW research question links the key questions in ODA and IW theory and the resulting question addresses this study's third research objective (i.e. see Section 2.13, *Establish a case study research methodology that applies discursive institutional work analytic processes*).
- b) *Theoretical Aims*. The converged aims result in a method that produces a discursive model of institutionalisation, which addresses this study's first research objective (i.e. see Section 2.13, *Develop a discursive model of institutionalisation processes by specifying the conditions in which it may provide explanations*).
- c) *Role of agency*. The converged DIW model situates the role of collaborative actors in discursive processes, thus providing a method for addressing the second research objective (i.e. see Section 2.13, *Investigate a collaborative practice of undergraduate degree development in an emergent strategic action field*).
- d) *Role of processes*. The converged DIW model establishes the role of discursive institutional work processes in the degree development, thereby providing a method for addressing the second research objective (i.e. see Section 2.13, *Investigate a collaborative practice of undergraduate degree development in an emergent strategic action field, which constitutes an innovative institutionalisation practice*).

The features of the resulting DIW model underpin how the methodological approach progresses, including how the discursive processes, multiple forms of institutional work, and actors in the ESR case interplay. This model helps examine how collaborative actors in a strategic action field do institutional work (i.e. creating,

maintaining and disrupting institutions) through discursive processes (Hardy, 2011; Phillips et al., 2004). The following section discusses the interrelated dimensions of the discursive institutional work (DIW) model.

3.4.1 Dimensions of the Discursive Institutional Work Analytic Framework

The DIW methodological framework integrates elements of prior discursive studies of institutionalisation including various dimensions and relationships. As noted earlier (see Section 3.3.3.1), of particular note is the Discursive Model of Institutionalism developed by Phillips et al., (2004). Their model argues that institutionalisation is propelled by texts that communicate actions and that it occurs via the actions of actors that produce the texts, which can leave traces that become embedded in discourses, and which then provide the mechanisms that enact institutions. Institutions can then enable or constrain further actions that produce more texts (etc.).

This approach to discursive institutionalisation is also the basis of Hardy's (2011) conceptualisation that text production, distribution, and consumption are integral to institutionalisation, and that patterns in texts create, maintain, and disrupt institutions (Hardy, 2011; Maguire & Hardy, 2009, 2006). Both models present processes of discourse analysis that are focused on the systematic study of texts – including their production, distribution, and consumption – in order to examine the relationship between discourse and institutions (Hardy, 2011; Phillips et al., 2004).

This study adopts Phillips et al.'s (2004) explanations that texts (and their related discourses) are likely to have enduring influence if they:

- are produced by certain actors, who have a legitimate voice, have resource power, have formal authority, or are centrally located in a field.
- take the form of genres that are recognisable, interpretable and usable in other organisations.
- draw upon and contribute to well-established discourses.
- are coherent and structured.
- are supported by broader discourses and are not highly contested by competing discourses.

3.4.1.1 Strategic Action Fields

This study's DIW framework first provides a way to examine the influences that constituted the emergence of a specific strategic action field (Fligstein and McAdam, 2012, 2011) – the Canadian retail management education field. The influences include three types of mobilising mechanisms: the identification of threats by one or more actors, the actors' access to mobilising resources, and the generation of innovative actions. To begin, exogenous changes in the external environment and endogenous changes within the field are identified as threats. Then, the availability of mobilising resources is identified, and these resources are identified according to which type of actor brings the resources to the process. Finally, innovative actions oriented to constituting the degree development processes are identified.

3.4.1.2 Actors - Interorganisational Collaborations

The DIW model then examines the influence of the various interorganisational ESR actors, and (further to Phillips et al., 2004) asserts that only certain actors produce

institutionalising discourses and that they are likely to be actors who engender compliance with or obligation to accept a message (Hardy, 2011).

The actors in the ESR study are organisations and interorganisational collaborations that had a legitimate right to speak, had resource power, had formal authority and were centrally located in a strategic action field. The actors' legitimate right to speak was related to the nature of their centrality in the field (Rowley, 1997), collective identities (Hardy et al., 2005) and interorganisational collaborations (Lawrence et al., 2002). This project then utilises the dimensions of identity and collaboration described in the Hardy et al. (2005) and Lawrence et al., (2002) studies (see Section 2.5.2) to analyse the nature of the multiple ESR organisational actors.

The DIW model then provides a method for analysing three discursive dimensions – IW Actions, Discursive Work and Texts.

3.4.1.3 IW Actions

IW actions refer to discursive actions (i.e. the actual production, distribution and consumption of texts) and the type of institutional work to which the discursive actions are directed. The model is, thus, informed by Lawrence and Suddaby's (2006) typology of different forms of institutional work, described in Section 2.8. The institutional work categories identify the actions as the means for creating, maintaining, and disrupting the institutionalisation of the degree development process. Given that legitimisation is a key institutionalising influence (Phillips et al., 2004), this study investigates how legitimisation strategies are structured through the

IW actions drawing on Van Leeuwen's (2007) model of legitimization strategies (see Section 2.10).

3.4.1.4 Discursive Work

As discussed earlier (see Section 3.3.2.2), and drawing from the Phillips et al. (2004) model, in order for discourses to produce institutions, discursive themes need to be structured and present a unified view that can be taken for granted and can be supported by other discourses. Coherent discursive themes and texts are likely to be adopted, and the meanings that endure through multiple distributions and consumptions are likely to produce institutionalisation (Hardy, 2011; Maguire and Hardy, 2009; Phillips et al., 2004).

This study examines the structure and coherence of the ESR discursive themes by analysing their interdiscursivity and intertextuality, and how they are related to producing institutions (Gee, 2011; Hardy, 2001; Fairclough, 1992). The analysis then traces the interplay of the themes through evidence of temporality, repetition, cross-referencing, and iteration.

The analysis also identifies how the discursive themes are supported by other well-established discourses. If discursive themes are not contested, they are often taken as a dominant discourse and taken as true (Grant et al., 2004). When themes are contested and defended, the process constitutes how they secure general acceptance (Fairclough, 1992). This study, therefore, identifies competing discourses, incidences when they were presented and discursive work used to counter them. The texts which contain the discursive themes are then analysed.

3.4.1.5 Texts

The texts produced throughout the degree development process were necessary for the degree to be accepted as a new institution. This study follows Phillips et al.'s (2004, p. 636) positioning that ODA “involves analysis of collections of texts, the ways they are made meaningful through their links to other texts, the ways in which they draw on different discourses, how and to whom they are disseminated, the methods of their production, and the manner in which they are received and consumed”.

In practical terms, the DIW model analyses the types of genres the texts represented. For example, the ESR texts include proposals and reports which were easily recognisable and interpretable templates for other organisations to use (Phillips et al., 2004). The texts were used by higher education institutions, professional associations, and government agencies. This study's methodological framework uses Maguire's (2004) categorisations of genres (see Section 2.9) to analyse the types of texts in the ESR study according to temporal patterns related to who produced them, to whom they were distributed, and to the reasons they were produced.

The analysis then examines the nature of the institutional elements produced throughout the process.

3.4.1.6 Institutionalisation

The study analyses the nature of the institutional elements constituted throughout the degree development process. Regulative, normative, and cultural-cognitive elements are analysed for constitutive and temporal patterns. In particular, cultural-cognitive

elements are investigated for characteristics of professionalising discursive themes, using Muzio et al.'s (2011) approach which describes three primary professionalising elements: jurisdictional claims, a distinct body of knowledge, and education of practitioners (see Section 2.10).

As noted earlier, unlike Phillips et al.'s (2004) model of discursive institutionalisation, this study's DIW model does not represent a linear process. Rather, all of the model's dimensions (see Figure 3.2) are connected with bidirectional arrows, representing recursive and interrelated relationships.

3.5 Chapter Three Summary

This chapter presents a discussion of the theoretical underpinning of the research methodology, the details of the methodological approach, and the methodological framework that guides the analysis. In doing so, the chapter has provided a sound foundation for the investigation.

This study responds to Phillips et al.'s (2004) call for "much broader understandings of the discursive processes underlying field development." (Phillips et al., 2004, p. 647). By investigating the interrelationships between dimensions of multiple interorganisational collaborations and discursive institutional work, this analysis will explain the interplay between discursive institutional work processes and the development of an innovative field-level institutional practice.

In summary, the chosen methodological approach in conjunction with the DIW conceptual framework has created a way to investigate the processes involved with a

collaborative practice of degree development. This combined approach produces dimensions that can be used as lenses of investigation. Specifically, this study defines discourse as a set of interrelated texts (referred to as genres) and their related practices of production, distribution, and consumption, which brought upon institutionalisation of a discursive object – a retail management degree development process. The texts constituted institutional work actions upon which the actors (i.e. the public-private, interorganisational collaborations) drew and through which they simultaneously produced the discursive object. Thus, the study's discursive approach to institutionalisation is both processual and contextual (Hardy et al., 2005; Phillips et al., 2004; Lawrence et al., 1999).

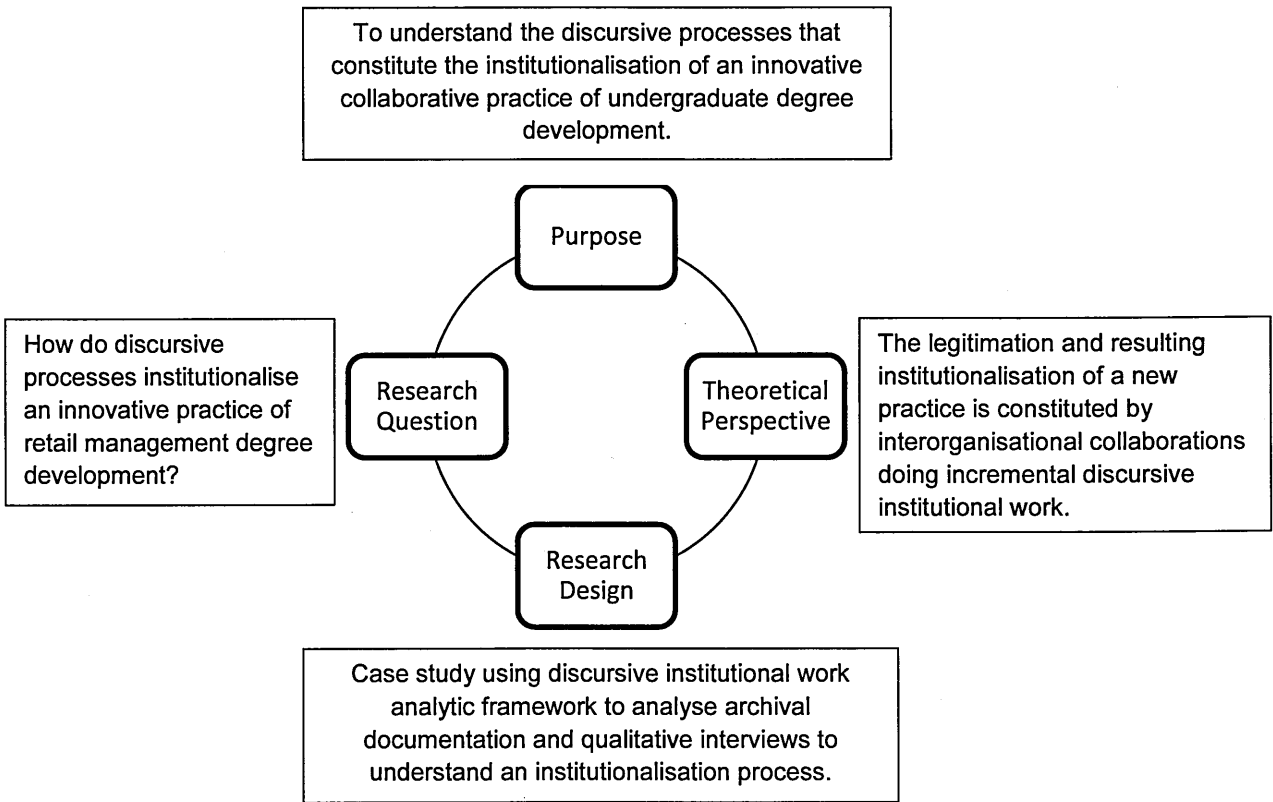
The second part of the methodological approach is presented in the next chapter. Chapter Four discusses the design and justification for the use of the case study, data collection, and management processes. The Chapter also includes a step-by-step description of how the DIW analytical framework is applied in the ESR study. Finally, Chapter Four provides an explanation of the validity and reliability measures present throughout the analysis, including a reflection on the multiple decisions made about the methodological approach and ethical considerations related to the data and the role of the researcher.

Chapter 4: Methodology II - The Case Study Design

4.1 Introduction

Previous chapters have set out this study’s purpose and related research question, and detailed how various theoretical perspectives provide appropriate lenses for examining them. The purpose of Chapter Four is to present the case study that is the basis of the research design and to justify its use as the methodology for this study. As illustrated in Figure 3.1, the research design is aligned with the thesis’ purpose, research question and theoretical perspective.

Figure 3.1 Key aspects of this study



Source: Developed for this study

This chapter will justify the selection of a single case study, explain the data collection, analytic and management strategies for the case, and clarify the validity and reliability measures and ethical procedures of the methodology.

The chapter is organised as follows: the chapter begins with a discussion of the rationale for applying the case study strategy. The next section sets out the reasons for the selection of the Eaton School of Retail (ESR) case, followed by a discussion of the research design and protocols, which are linked with the discursive institutional work analytical method set out in Chapter Three. The data collection strategy is then presented, including a justification of the sources of the archival documentation and interviews. The data collection strategy is followed by the data management process and a step-by-step description of the stages in the analytic process. The chapter concludes with a discussion of the validity and reliability measures, and ethical considerations prevalent throughout this study, including a comprehensive reflection about the decisions made.

4.2 Rationale for the Application of a Case Study Approach

This study uses a case study strategy which Eisenhardt (1989, p. 534) defines as “a research strategy which focuses on understanding the dynamics present within single settings.” The reasons for choosing a case study design are related to considerations of the nature of the a) research question, b) the research unit, and c) the event. The rationales related to each consideration are discussed in the following sections.

a) Nature of Research Question. According to Yin (2014), case studies are appropriate for projects that ask “how” or “why” questions. This project’s research

question is “How do discursive processes legitimate an innovative practice of retail management degree development?” This question deals with how processes resulted in institutionalisation, and therefore, it is a research question for which this case study design is suited.

b) Nature of Research Unit. A case study design is appropriate for holistic, in-depth investigations (Yin, 2014). In holistic investigations, “the research unit is the object about which the researcher wants to produce knowledge.” (Verschuren, 2003, p.125) and case studies help to understand the research unit as a whole. Case studies are particularly appropriate when the research question and research unit are closely connected to the context in which they are set (Farquhar, 2012). For example, in this case, the research unit is the discursive processes involved with collaborative degree development processes and the case is oriented to understanding the complexities and contextual factors involved with them. In particular, the context for the research unit in this study is the Canadian retail management education field and a case study is ideal for exploring the range of perspectives related to the field (Farquhar, 2012).

Holistic investigations trace the same set of actors interacting with events over time and, therefore, emphasise processes, which are the foci of this study’s research question. The boundaries of the analysis are the time frame between the Eaton’s decision in 1993 to pursue a partnership with a university and 1998/9 when the first degree programme was approved.

c) Nature of Events. Yin (2014) suggests that a case study design is appropriate when examining contemporary events and when the researcher has no control over

the events. Although this case presents a combination of historical and contemporary events, histories and case studies can overlap in business research (Yin, 2014; Rowlinson, 2005). The historical nature of the ESR case is presented through archival documentation and through current interviews with people who were involved with the case.

In spite of being a current faculty member with the degree and an instructor with some of the ESR pilot courses, the researcher had no control over the case study events, had no involvement with the development or discursive processes, and had no opportunity to observe them when they were occurring.

This study employs a single-case design that is oriented to a holistic analysis (Yin, 2014; Stake, 1995). The analysis of holistic investigations is detailed and intensive and focuses on identifying patterns and generating insights (Farquhar, 2012; Stake, 1995). The benefit of adopting the single-case approach is that it provides the means to examine a significant phenomenon under unique circumstances. The selection of single cases is criticised for not producing generalisable findings; however, the purpose of case study research is particularisation and not generalisation (Stake, 1995). This research therefore strives to understand the complexities of a particular case. Single cases are chosen because 1) they are critical for testing a well-formulated theory, 2) because they are unusually revelatory, or 3) they are extreme or unique (Yin, 2014). The single case study selected for this study is chosen for the third reason.

The ESR case is a unique case that chronicles a singular event in Canadian retail management education. This case is the first time that a Canadian sector-specific (the retail management sector) degree programme has been developed through collaborative discursive processes. The originating partnership between Ryerson University and Eaton's is a collaboration that mobilised the participation of government, university and sectoral actors, and the development of an undergraduate, sector-specific degree programme was constituted from Continuing Education certificate programmes. The originating Ryerson/Eaton's collaboration emphasised the legitimisation of the degree development process through the managerial professionalisation of retail management. As the various ESR collaborations evolved, they used multiple forms of discursive institutional work (DIW) to legitimise the process.

This unique case provides an appropriate organisational setting for the discursive analysis. The setting criteria (Yin, 2014) are that the case occurs in a retail management field that is under professionalised and that does not have a degree programme. Canada did not have a retail management degree, so it provides a suitable setting and thereby constitutes a strategic action field. The internal criterion (characteristics of the participants) is that at least one of the participants needs to be a degree-granting institution and one needs to be a private retail organisation. Ryerson University is a degree-granting institution and Eaton's was a private organisation, so the ESR case chronicling their participation provides a suitable case study.

The following section provides a comprehensive justification of the reasons for selecting this particular case for this study.

4.3 Case Selection

When applying the case study strategy, it is important to select a suitable case and to consider the type of case study design. Stake (1995) identifies three types of cases: 1) intrinsic: when the researcher has an interest in the case; 2) instrumental: when the case is used to understand more than the obvious; and 3) collective: when a group of cases is studied. Based on Stake's (1995) framework, this study uses an intrinsic-instrumental case study approach. This approach is applicable because the case presents a unique opportunity to examine the development of a new institutional practice. Furthermore, the researcher's role as a Canadian retail management academic means that she has an interest in the development of the Canadian degree. Ultimately, the case represents a unique opportunity to probe the situation leading to the development of retail management education in Canada.

The case selection is based on demonstration of necessary characteristics related to the research question, objectives, and conceptual framework. In order to answer the research question (see Figure 3.1), the case demonstrates:

- Discursive processes;
- An innovative retail management degree development practice.

In order to satisfy the research objectives (see Sections 2.13 and 3.1), the case demonstrates:

- An empirical example of discursive institutionalisation from which to draw theoretical conditions (Objective #1);

- Convergences of institutional work (Objective #2);
- Collaborative retail management degree development processes (Objective #2);
- Legitimation and corporate professionalising strategies (Objective #2);
- Discursive institutionalising work (Objective #2).

The case also demonstrates how the case characteristics interact, thereby presenting an empirical example of DIW as a methodological approach (i.e. Objective #3).

The case elaborates a theoretical discursive model of institutionalisation, which is the aim of Objective #1 and theoretical elaboration is an aim for which theoretical sampling is appropriate (Eisenhardt and Graeber, 2007). Theoretical sampling means that a case is selected because it is particularly suitable for illuminating and extending theory and the unique case in this study presents a suitable means for illuminating a theoretical discursive model of institutionalisation. Selecting the unique ESR case maximises what can be learned, for the purpose of generating theory from the findings (Yin, 2014; Stake, 1995).

The ESR study examines a single case study via a number of theoretical frameworks. When more than one theoretical framework guides the analysis, one case study can provide confirmation, fuller specification, and/or contradiction of the related theoretical notions (Maitlis, 2005; Lee et al., 1999). As with a process tracing analytic approach (Bennett, 2005), the analysis uncovers causation within the context of a historical case by referring to theoretically based explanations at each step.

In summary, this section provides the rationale for adopting a single case, and, in doing so, sets out the conditions which justify this approach. The following section

details the research design and the specific protocols (suggested by Yin, 2014), which guide the case study research process. It also links the research design with the DIW analytical method set out in Chapter Three.

4.4 Research Design and Protocols

This section examines the practicalities of the case study research. A case study can generate a significant amount of un-classified data and therefore it is important to adopt an organised approach. A case study protocol provides an appropriate organising mechanism.

A case study protocol is the documentation of a case study’s data collection procedures. Yin (2014) suggests that protocols are useful for guiding the research process and providing a dependable process that can be followed by other researchers. The protocols portrayed in Table 4.1 have been found to be helpful for guiding this case study research process.

Table 4.1 ESR Case Study Protocols

Research question:	How do discursive processes institutionalise an innovative practice of retail management degree development?
Research method:	A single unique case study
Research unit:	Public-private collaborations during development of Canada’s first retail management degree
Case selection criteria:	<i>Setting Criteria:</i> <ul style="list-style-type: none">• Strategic action field constituting an under-professionalised retail management field without a degree programme. <i>Internal Criteria:</i> <ul style="list-style-type: none">• Interorganisational collaborations including a university degree producing institution, and embedded corporate actors from the retail sector
Case Access:	July, 2009 - Identify case fulfilling criteria in research protocol. August, 2009 - Negotiate full access to data sources August, 2009 - Meet to gather case documentation 2010 - Conduct literature review November, 2011 - Conduct Interviews 2012 - Conduct data analysis

Data sources:	<ul style="list-style-type: none"> • Archival documentation • Interviews • Literature review • Review of industry association, university websites
Analytic Frameworks:	Archival Documentation: Discursive institutional work (DIW) Interviews: Organisational discourse analysis
Research methodology and techniques	<ul style="list-style-type: none"> • Discursive institutional work (DIW) analysis of: <ul style="list-style-type: none"> ◦ Strategic Action Fields (Fligstein and McAdam, 2012, 2011) ◦ Actors (Hardy et al., 2005; Lawrence et al., 2002; Rowley, 1997) ◦ Institutional work actions (Lawrence and Suddaby, 2006) and Legitimation (Van Leeuwen, 2007); ◦ Discursive Work (Phillips et al., 2004) ◦ Texts (Maguire, 2004) ◦ Institutionalisation (Scott, 2001) and Professionalisation (Muzio, 2011; Arndt and Bigelow, 2005)
Data management	Audit trail = Decisions about research design, data sources and justification, data cataloguing, codebook creation, electronic data copying, filing

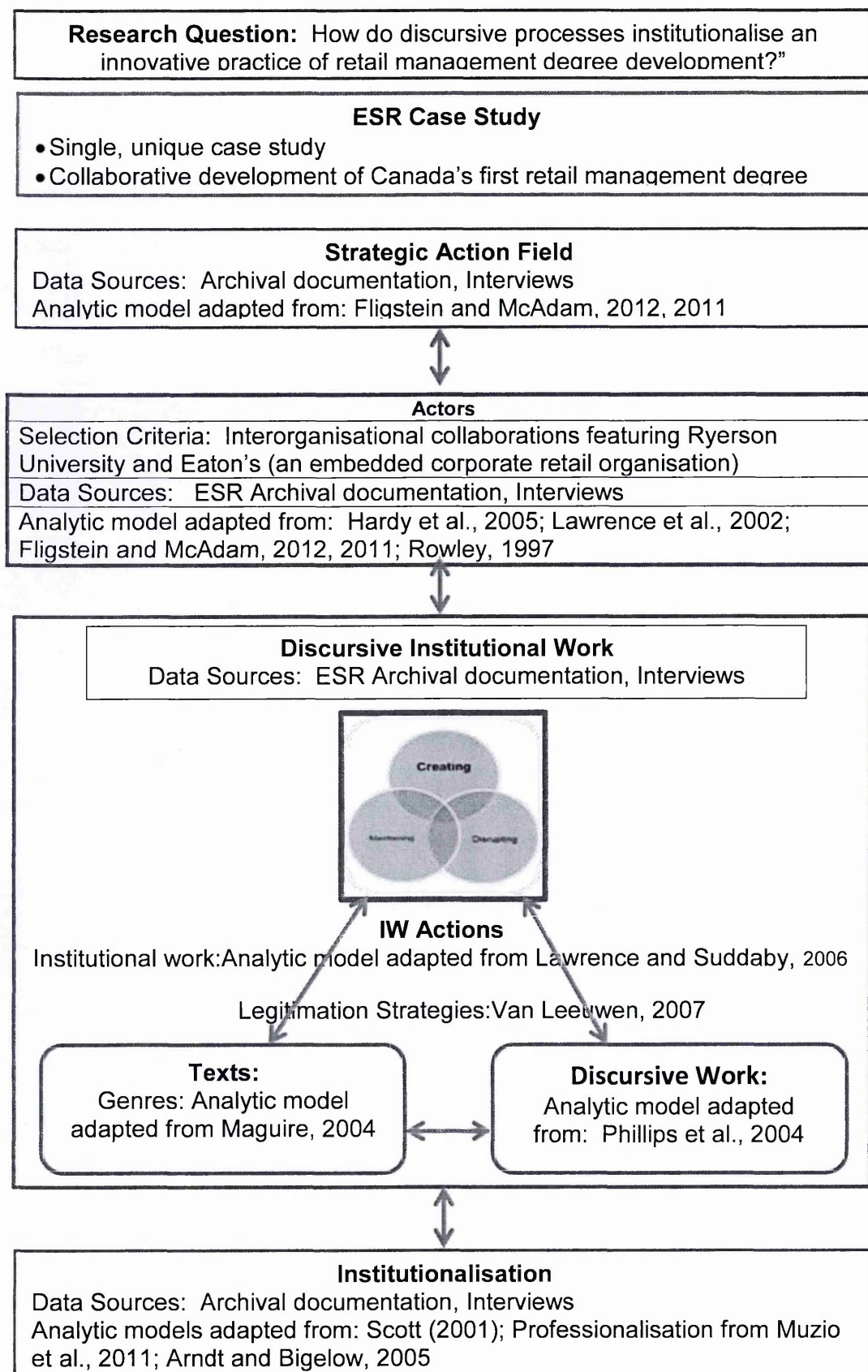
(Source: Adapted from Yin, 2014; developed for this study)

After identifying the case, the case access progresses through negotiating access to discursive data, gathering documentation data, conducting literature reviews, conducting interviews, and conducting analysis of the accumulated data. The ESR archival documentation and interviews provide the data sources. The Discursive institutional work (DIW) model described in Chapter 3 provides the analytic framework and features an ODA analysis of the data via various theoretical dimensions including:

- Strategic Action Fields
- Actors
- Discursive Institutional work:
 - Institutional work actions and Legitimation
 - Discursive Work
 - Texts
- Institutionalisation and professionalisation

Figure 4.2 portrays how the ESR case study provides the setting for the DIW analysis described in Chapter Three.

Figure 4.2 Discursive Institutional Work: An analytic framework Source:
Developed for this study.



The data is managed via a thorough audit trail of the data (Farquhar, 2012; Creswell and Miller, 2000). An audit trail includes all of the steps taken in the stages of data collection and analysis. In this case, the audit trail includes collecting data from different sources, justifying the selection of the sources, creating codebooks, creating an interview guide, cataloguing data, and making electronic data files. The following section discusses the data collection strategy.

4.5 Data Collection Strategy

This section describes the strategy that this study uses to collect data. The data collection strategy is purposive (Miles and Huberman, 1994), in keeping with the study's focus on context and in-depth analysis. The choices about informants and interactions are driven by the research question, and aligned with the overall purpose of providing perspectives about conditions surrounding the case. Thus, the choices are oriented to intensively studying interorganisational collaborations, discursive work and institutionalisation of a degree development process while generating a large amount of information.

With reference to Yin's (2014)'s suggestions about collecting data for reliable case studies, this study adopts three principles of data collection: a) The study uses multiple sources of data; b) the study creates a case study database; c) the study maintains a chain of evidence.

a) *The study uses multiple sources of data.* Yin (2014) lists six sources of evidence for data collection for case study research: documentation, archival records, interviews, direct observation, participant observation, and physical artifacts. They

may be complementary, and not all of them need to be used, but multiple sources of data are important to the reliability of the study (Yin, 2014; Farquhar, 2012; Stake, 1995). Likewise, this study uses multiple sources of data, including archival documentation and interviews, so that the data provides multiple perspectives and a degree of contextualisation, and also reveals processes and histories.

b) *The study creates a case study database.* The database provides a resource for other researchers. The database includes:

- a step-by-step analytic method;
- a catalogue of archival documentation (Appendix B: Table 4.6);
- an analytic codebook which is used to code the actors, texts and discourses presented in the data;
- electronic files of documentation and interview data, and
- an interview guide (Figure 4.3) which is used with interviews.

c) *The study maintains a chain of evidence.* This study follows the evidence from the research questions through to the conclusions. Specifically, the chain of evidence provides cross-referencing from methodological procedures to the resulting evidence and includes:

- references to the database where evidence is stored;
- the actual evidence and how it was collected;
- how the procedures follow the case study protocol;
- how the research protocol links to the research question.

The following section discusses specific parts of the data collection strategy related to collection of the archival documentation data, and the interview data.

4.5.1 Archival Documentation Data

Archival documentation is historical documents that provide access to events from an earlier time (Ventresca and Mohr, 2002). This case study accesses archival documentation from the T. Eaton's Company and from Ryerson University, which are the two organisations that originated the ESR process, and participated throughout its development.

In the initial stage of data collection, Ryerson University appeared to be the most likely source of data about the degree development process. The culminating degree is operating as a current programme and is situated in the Ted Rogers School of Retail Management (TRSRM) at Ryerson University. Two of the faculty (one of whom held the original Eaton Chair in Retailing) had participated in the ESR development process, so the researcher contacted the School to request access to any relevant ESR documentation. However, the available documentation was limited to a 2010 Program Review that had documented the origins of the degree. The Director of the School gave the researcher access to the Review. This documentation is used as data in this study, and is analysed for contextual data related to the process.

Because the degree development process originated with the Faculty of Continuing Education (CE) at Ryerson, the CE Faculty was then contacted to negotiate access to any ESR documentation that had been kept by the University. However, the department had moved several times, most of the ESR participants had left the University (including the CE Director that originated the ESR partnership for Ryerson) and the documentation had been discarded.

The researcher was then referred to the former General Manager of the ESR as a possible source of ESR archival documentation. Eaton's declared bankruptcy in 1999 and the Eaton's employees who participated in the degree development had moved to other organisations, retired, or passed away. The General Manager of the ESR had retired, but had maintained contact with the University, through the TRSRM School Advisory Council (in a limited way as an information source in the early years of the degree) and through personal relationships with the Dean, the former CE Director and the faculty members who had participated in the ESR development.

The ESR General Manager had kept a personal archive of the documentation related to the development of the ESR and of the Ryerson programme. The archival documentation only contained the documentation that the ESR General Manager kept, and that had survived Eaton's demise, office moves, and retirements, which are common conditions surrounding studies that utilise archival documentation (Rojas, 2010). However, the value of archival documents is that they reveal what past actors wanted to publicly convey or to provide as a record of decisions (Rowlinson, 2004). Unlike interviews, archival documentation has not been generated or organised for the purposes of this study (Rowlinson, 2001). When the ESR General Manager retired, he kept what he considered to be the most important documentation. The result was an organic accumulation of the ESR project's documentation, most of it organised in binders. The ESR development predated electronic filing systems, so his archive included original versions and were the only copies in existence.

The researcher phoned and visited the former ESR General Manager at his home office, in order to secure access to the documentation. He lent her two boxes of

documentation to analyse for this study and she made him a verbal promise to return the documentation to him when the PhD work is complete. The documentation will then be donated to the Province of Ontario Archives and included in the T. Eaton Company archival documents.

Some of the documents have not been selected for the ESR study due to the following three reasons:

- 1) they are not related to the ESR project. In particular, there are some documents that relate to Eaton's 125 year anniversary and to the repositioning of the company's marketing strategy.
- 2) they have become illegible over time and are not usable.
- 3) they are exact copies of other documents in the archive.

The selected documentation included specific references to the Eaton School of Retailing (ESR), the Eaton Chair in Retailing, and the Canadian Retail Management Education Program (CRMEP). The documents include organisational documents, general media articles, trade media articles, proposals, reports, marketing materials, course CD-ROMs of participant materials, conference presentation materials, and a Harvard University case study based on the ESR programme. Table 4.2 (Appendix B) provides a catalogue of the archival documentation that is selected for this study, organised by date.

In addition to archival documentation, the researcher interviews key informants. The following section discusses the strategies used in collecting interview data.

4.5.2 Interview data

This study utilises focused interviews with people that participated in the ESR development process. The interview process progressed through stages of thematising and designing before the actual interviewing began, and which then guided the transcribing stage of the interview data (Kvale, 2007). The following sections detail the process as it progressed through these stages.

4.5.2.1 Thematizing

During this first stage of the interview process, the purpose of the interviews and the conception of interview themes is developed. The purpose of the interviews is to provide new insights into the ESR case and to consider the opinions and experiences of people with direct experience with the ESR case.

Furthermore, the aim of the interviews is to gather confirming and disconfirming evidence in relation to the archival documentation data. As a result, they are conducted after the first reading of the archival data (i.e. Stage 1 of Analytic Method, Section 4.6.1).

The thematic focus of the interviews is the societal and historical context surrounding the ESR degree development process. Therefore, the interviews are purposive in nature (Kvale, 1996) and strive to understand the social and historical context of the case from the perspectives of key informants.

Interviews, therefore, are chosen as data for this study because:

- they provide confirming and disconfirming evidence in relation to other data sources;
- they provide the opportunity to generate rich data;
- contextual and historical aspects are important to understanding perceptions about the phenomena;
- data generated can be analysed in different ways.

4.5.2.2 Designing

The sampling method is purposive sampling, by which the researcher uses her judgment to select interviewees whom she considers most appropriate for the study (Easterby-Smith et al., 2008; Creswell, 2003). The nine (9) interviewees constitute a key informant sample; they are chosen purposively and have special expertise, based on their prior experience with the ESR case. The historical nature of the case presented a challenge for locating interviewees. The T. Eaton Company was dissolved in 1999, and as a result, the number of key Eaton's personnel available to be interviewed had dwindled. However, the former ESR General Manager agreed to be interviewed as did a former ESR student who had maintained contact (i.e., as a contact for student internship opportunities) with the current degree. The former CE Director who originated ESR with Eaton's no longer works with Ryerson, but the researcher located him through the former ESR General Manager. He was contacted and agreed to be interviewed. Two of the Ryerson ESR participants are current TRSRM faculty members and they agreed to be interviewed. One of these faculty members also held the original Eaton Chair in Retailing. The Director of the current degree (TRSRM) provided access to the degree's 2010 programme review and agreed to be interviewed to provide context about the process. The current President

of the Retail Council of Canada had been in her position during the ESR development, and also agreed to be interviewed. Other retail association representatives had been in association or academic positions at the time of the ESR development and agreed to be interviewed about the context of the process.

The interviews are semi-structured in nature, which is defined as “an interview with the purpose of obtaining descriptions of the life world of the interviewee with respect to interpreting the meaning of the described phenomena.” (Kvale, 2007, p. 8). Semi-structured interviews are appropriate for the collection of confirming and disconfirming information because they allow for the discovery and elaboration of information that may not have been evident from other data sources (Easterby-Smith et al., 2008; Kvale, 2007).

4.5.2.3 Interviewing

An Interview Guide (Figure 4.3) was circulated to respondents prior to interviews and each respondent interview lasted approximately one hour. Four of the interviews were conducted in the researcher’s private office, which provided a comfortable, quiet setting. Five of the interviews were conducted by telephone at predetermined, reserved times.

The Interview Guide provided a predetermined list of discussion points (see Figure 4.2), which were presented to each interviewee (Kvale, 1996). The interviews used a set of open-ended discussion points derived from the case study protocol, and assumed a conversational manner, based on the interviewer’s invitation for interviewees to “Tell me about...” their experiences and perceptions. Prior to the

interviews, the interview guide and informed consent form were approved by the Open University and Ryerson University Ethics Review Boards.

In advance of the interview, each respondent received and signed a written informed consent form. The consent form disclosed details about the researcher and the purpose of the study. Their voluntary participation and anonymity were confirmed, as were the data collection methods and sources, recording and storage processes and feedback processes. Importantly, the interview sources were given the choice to refuse to participate at any time, thereby ensuring that data was offered freely. Interviewees were notified that the interviews were tape recorded and they were given the opportunity to ask any questions at any time.

The discussion points were developed to prompt interviewees' input in relation to the study's research question and objectives. For example, points #1, 2, 3, and 4 ask them about their experiences with the development of a retail management degree programme. Other points probe for their experiences with the relationships between legitimacy, professionalism and retail management education programmes.

Figure 4.3: Interview Guide

Interview Guide	
Date :	
Name :	
Organisation :	Title :
Tell me about your:	
1. Experience with the Eaton School of Retailing?	
2. Experience with retail management education?	
3. Experience with retail management degree development?	
4. Experience with stakeholders involved with a retail management degree development process.	
5. Experience with Canadian retail management careers?	
6. Perceptions of legitimacy and professionalism of retail management careers?	
7. Experience and perceptions of how retail management education affects the legitimacy of retail management careers as a profession.	

4.5.2.4 Transcribing

The MP3 files of the audiotaped interviews were transcribed into Microsoft Word files.

A professional transcriber was hired to transcribe verbatim responses to the interviews. The MP3 and Word files are stored on separate encrypted USB keys.

As a result, the transcribed records represented texts constituted by words and relatively gross features such as corrections or confusions. This transcription process is useful because it provides a textual format for the purposes of discursive analysis.

4.5.3 Justification of Data Sources

The documentation and interview sources are summarised in Table 4.3. The justifications for using the selected documentation and interviewees as data sources are summarised in Table 4.4. Referring to the sources listed in Table 4.3, the justifications are related to how the ESR case provides empirical evidence of the study's research objectives. The data sources constitute both archival documentation and interviews – i.e. the Eaton's ESR source provides:

- archival documentation from the ESR General Manager – coded Documentation A
- interviews with the ESR General Manager – coded Interview A and with a former ESR student – coded Interview B

Table 4.3 Data Sources

Source	Archival documentation	Interviews	Code
Eaton's:Eaton School of Retailing (ESR)	ESR General Manager	ESR General Manager	A
		Former ESR student	B
Ryerson University: Eaton School of Retailing (ESR)		Former Director of Continuing Education (CE)	C
		ESR developer/Faculty member/First Director of Ryerson Retail Management degree	D
		Former Chair, Eaton Chair of Retailing	E
Ryerson:Ted Rogers School of Retail Management	2010 Periodic Program Review	Director of current degree TRSRM	F
Retail Associations		President – Retail Council of Canada (RCC)	G
		President/CEO–Purchasing Management Association of Canada, Former Exec. Director–Canadian Grocery Human Resource Council	H
		President – American Collegiate Retailing Association	I

Table 4.4 Justification for Data Sources

Objectives:		Justifications: Analysis of the sources will reveal:		Sources (see Table 4.4 for Codes)	
To develop a discursive model of institutionalisation processes by specifying the conditions in which it may provide explanations	To investigate a collaborative practice of undergraduate degree development in an emergent strategic action field, which constitutes an innovative institutionalisation process.	Nature of discursive elements in degree development process including elements of: <ul style="list-style-type: none"> • Strategic action fields • Interorganisational collaborations • Discursive institutional work (DIW) • Institutionalisation 	<ul style="list-style-type: none"> • Examples of characteristics of emergent strategic action fields • Examples of institutional work including interplay of creating, maintaining, disrupting institutional work. • Examples of legitimating discursive themes • Examples of genres of texts • Examples of nature of interorganisational collaborations involved with development of retail management degree process • Managerial professionalising discursive elements of retail management degree development process including: <ul style="list-style-type: none"> ◦ Jurisdictional claims ◦ Body of Knowledge ◦ Education of practitioners 	Document- ation	A, F
				Interviews	A, B, C, D, E, G
				Document- ation	A, F
To establish a case study research methodology that applies discursive institutional work (DIW) analytic processes.	Unique case study that demonstrates how all of necessary case characteristics interact thereby presenting empirical operationalisation of DIW.			Interviews	A, B, C, D, E, F, G, H, I
				Document- ation	A

4.6 Analytic Method

The discursive institutional work (DIW) analytic model presented in Chapter Three (see Figure 3.2) is applied to the ESR case study. This model provides a flexible approach that accommodates the investigation of both context and text, and is suited to capturing multiple meanings in the data, including those related to broader theoretical frameworks (Paroutis and Heracleous, 2013; Hardy, 2001).

This study is primarily inductive in nature, where documentation data emerges through iterative readings and where interview data emerges through the use of open-ended discussion points. The emergent evidence is then used to expand and elaborate understanding of theory, by specifying the circumstances in which theory might provide an explanation (Maitlis, 2005; Lee et al., 1999).

The analysis is an iterative process, which utilises a constant comparative analytic process. In particular, the analysis works back and forth between the data and relevant literature, theories and models (Miles and Huberman, 1994; Glaser and Strauss, 1967). For example, all the archival documentation is open coded, followed by interviews, which are conducted to generate confirming and disconfirming data. The interviews lead to a re-examination of literature for relevant models, which is followed by further data examination and coding utilising the models.

Data from different sources and different times are repeatedly compared to discern major themes and processes. The comparisons note convergences and divergences in the discursive themes and in the ways the constituting texts are produced. The process helps to extricate the theoretically explanatory elements from the emerging

patterns in the data and to incorporate the elements into the emerging DIW conceptual model. The findings then provide insights into theory about institutionalisation. The following section describes the stages involved in analysing the archival documentation data and the interview data.

4.6.1 Stages of Analysis: Archival Documentation

The analysis of the archival documentation data proceeds through four stages, which involve exploring, categorising, describing, and classifying the data. The research question and related objectives provide the focus for the collecting, unitising, refining, and presenting of the data. Throughout the stages, the analysis uses a constant comparative process to identify emergent data themes, compare the themes, and determine patterns within the themes. The four stage data analysis process is summarised in Table 4.5 below and is then discussed in the following section.

Table 4.5: Data Analysis Stages

Stage	Tasks	Outputs	Display
Stage 1: Exploration and Organis- ation of data	<ul style="list-style-type: none">• Cataloguing archival documents• Reading data• Creating timeline of actions• Sorting documents according to year of production• Memoing documents for production and distribution (i.e. producer, recipients, type of document)• Creating open codes• Identifying emergent themes• Memoing documents for themes• Conducting Interviews• Identifying disconfirming data	<ul style="list-style-type: none">• Catalogue of archival documents• Event list• Sets of Text Producers• Set of 8 emergent discursive themes• Set of 9 Interview transcripts	Table 4.2 Table 4.6 Table 4.7
Stage 2: Data Categoris- ation	<ul style="list-style-type: none">• Refining data themes• Reviewing related literature• Identifying a priori theoretical frameworks• Creating analytic codebook using a priori frameworks	Analytic Codebook	Table 4.8
Stage 3: Descriptive Analysis	<ul style="list-style-type: none">• Coding of documentation and interview data via analytic codebook• Discerning discourse exemplars	<ul style="list-style-type: none">• Set of strategic action field characteristics• Set of organisational and interorganisational actors• Set of 31 Discursive Institutional Work themes• Set of 6 genres of text production and distribution• Set of discursive legitimization strategies• Set of professionalising discursive themes• IW Discursive theme exemplars	Table 5.1 Tables 5.2 Table 5.3 Table 5.6
Stage 4: Classific- ation Analysis	<ul style="list-style-type: none">• Tabling and charting data sets• Discerning characteristics of strategic action field• Discerning characteristics of actors• Discerning discursive IW actions• Discerning characteristics of institutional elements• Making connections to the organisational and institutional contexts by merging data sets and:	<ul style="list-style-type: none">• Merged data set table• Classification of characteristics of retail management education strategic action field• Classification of actors/text producers according to formal authority/power, centrality, collective identities, interorganisational collaboration	Table 5.8 Tables

Stage	Tasks	Outputs	Display
	<ul style="list-style-type: none"> o Clustering discursive institutional work with producers, text genres and legitimating strategies over time o Clustering DIW actions/texts according to 3 pillars of institutionalisation o Noting patterns, associations between discursive themes and DIW • Creating explanatory analytic model 	<ul style="list-style-type: none"> • Classification of IW actions/texts with producers, text genres, temporal professionalising strategies according to institutionalisation purpose 	
		<ul style="list-style-type: none"> • Classification of temporal IW discursive themes by IW purpose 	Tables 5.8, 5.13
		<ul style="list-style-type: none"> • Classification of genres according to purpose, producer, distribution 	Tables 5.7, 5.8, 5.9, 5.10, 5.11
		<ul style="list-style-type: none"> • Classification of discursive themes according to: <ul style="list-style-type: none"> o coherent themes that converge in descriptions, explanations; o structured themes drawing on each other in established, understandable ways; o broader discourses supporting retail management education; o competing discourses that do not highly contest discourses, related countering discourses 	
			Table 5.6
		<ul style="list-style-type: none"> • Explanatory analytic model 	Figure 5.3

This section provides a detailed discussion of the stages of the data analysis outlined in Table 4.5.

Stage 1: Exploration and Organisation of Documentation Data

The goal of the first stage is to explore the nature of the documentation presented in the case. A catalogue of the archival documents (Yates and Orlikowski, 1992) is produced (Table 4.2, Appendix B) which names and numbers the documents, organising them by date. The catalogue also lists the physical characteristics of the documents, so that they can be readily identified throughout the analysis.

The documents are then ordered chronologically to produce an event list. In addition, the following three documents provide comprehensive descriptions of the chronological events:

- The Eaton Legacy – produced by the ESR General Manager (Document #3);
- A Whole New Way – produced by Ryerson University (Document #12);
- Harvard University Graduate School of Education – produced as a Teaching Case Study (Document #83).

The three comprehensive descriptions are used to refine and chronologically order the event list (Table 4.6).

Table 4.6 Chronological Event List

Legend: Eaton's=T. Eaton Co. Ltd., ESR=Eaton School of Retailing, RU=Ryerson, RCC=Retail Council of Canada, ORSS=Ontario Retail Sector Strategy, IAS=Industrial Adjustment Services Initiative in Retail Management Education, HRDC=Human Resources Development Canada, NSERC/SSHRC=National Sciences and Engineering Research Council, NSAS=National Sector Adjustment Services

1992	Federal government commissions retail sector survey about Canadian competitiveness, need for retail management education.
1993	Eaton's announces mission statement Vision 2000, including ESR definition, vision, guiding principles
	Eaton's meets with RU to discuss ESR concept
	Eaton's conducts benchmarking about corporate education, learning organisations
	Eaton's gives presentations about ESR
	Eaton's sponsors seminar about best practices of North American retail learning organisations
	RU presents Eaton's with program development framework
	ESR formed via one-page agreement
1994	Senior Management Group formed
	ESR Vision 2000 Committee formed
	RU Phase 1 Advisory Committee formed
	Curriculum Development Committee formed
	RU Continuing Education Retail & Services Sector Advisory Committee formed
	ESR Phase 1 completed-delivery of 2 pilot intensive courses
	Ontario Retail Sector Strategy (ORSS) formed, joint initiative between retail industry and provincial government
	IAS Initiative formed
	Benchmarking North American, U.K. corporate universities, learning organisations
	Report – T.Eaton Co. internal needs analysis
1995	Eaton's and Ryerson submit proposal to Human Resources Development Canada (HRDC) for financial support for retail management education.
	HRDC funding approved with formation of IAS Committee to examine development, delivery of university retail management education.
	ORSS reports findings, supporting ESR initiative.
	IAS Initiative Proposal submitted
	IAS Approval received from Federal Government
	IAS Sectoral Committee formed
	IAS Steering Committee formed
	Intensive delivery of 7 credit courses to 1500 students in Toronto, Winnipeg, Edmonton, Vancouver, Montreal (French)
1996	Eaton Chair of Retailing established – funded by 5 year NSERC/SSHRC grant (\$650,000), \$2.2 million endowment from 40 corporate donors

Eaton Foundation announces funding for CD-ROM
RCC Award
Conference Board of Canada award
Vision 2000 Update announced
IAS Report on Structure of Demand & Societal Need for Retail Education with an Emphasis on Ontario published
Presentation made to IAS Committee about Demand & Societal Need
IAS Retail Management Education Initiative funding secured (HRDC-Federal government and retail sector) for program development, delivery
Report on Retail Management Education: A Review of Current Undergraduate Programs published
Report on The Alliance of RU, ESR & Bell Canada: A Business Plan for Distance Technology Enhanced Education published
ESR Poster produced/distributed
ESR featured on Bell Sympatico Home Page
Press Release on ESR released
ESR Advertisement in Canadian H.R. Reporter
ESR Academic retail program becomes the Canadian Retail Management Education Program (CRMEP)
CRMEP Video (French/English) video produced (600)
CRMEP Brochure produced/distributed (80 000)
CRMEP Schedule in Ryerson Continuing Education Catalogue
CRMEP Retailing as a Career newsletter published 3X
Degree Program advisory Committee formed
Pilot course using multimedia technology/classroom delivery
Ryerson Centre for Research on Lifelong Learning receives funding from Eaton's, Canada Post Corporation, HRDC to do ESR qualitative study
1997
Pilot course offered by distance education
National Retail Federation Award announced
Bachelor of Commerce degree receives RU approval
IAS Initiative Report published
Analysis of Educational Needs Assessment of Retail Employees published
Getting the Most out of Learning: a Qualitative Evaluation of ESR Report published
ESR Presentation at International Quality & Productivity Center Conference on Career Development - Toronto
ESR Presentation at International Quality & Productivity Center Conference on Corporate Universities - Toronto
ESR Presentation at Corporate University Forum on "Designing a Virtual Corporate University – Cambridge, Mass.
Harvard Case Study published
1998
Skills Standards of Sales Associates & Entry-level Managers report published
Career Awareness strategies/materials for high schools, parents, teachers, counsellors, individual workers, managers published
\$125,000 grant from Office of Learning Technologies (HRDC) toolkit for development, evaluation of distance education courses announced
NSAS The Accidental Career: Report on Careers in Retailing published
Report on Evaluation Model for Technology Enhanced Learning in Retailing published
Bachelor of Commerce degree courses launched

Memos (with sticky notes) are then created for the documents that note:

- the producers;
- the intended recipients;
- the genres.

The documents are then read and memos are created, noting emerging themes. As themes emerge, they are assigned name and colour codes, thus capturing them via open coding, which focuses on identifying, labeling, and classifying the data. A codebook of eight emergent discourse themes is developed to keep track of the themes (Table 4.7).

Table 4.7: Emergent Themes Codebook

Colour Codes	Emergent Themes
Green	NEED FOR RETAIL MANAGEMENT EDUCATION There is a dearth of Canadian retail management education Industry wants more retail management education There is demand for part-time education from current retail employees/potential retail managers There is interest from high schools There are job opportunities – due to industry restructuring, need for educated employees Retail is an important Canadian sector
Orange	SECTORAL/OCCUPATIONAL STANDARDS Development of standards provides basis of degree program, related professional certifications
Dark Blue	INTERORGANISATIONAL COLLABORATIONS Retail management education development supported by industry, government, professional associations Respond to identified needs
Yellow	NEW RETAIL MANAGEMENT CAREER IDENTITY Retail management is an attractive, long-term career choice Retail management is a knowledge based career choice Retail Management Education professionalises retail management as a career
Light Blue	MIMICRY Retail management education is already legitimate in other jurisdictions Benchmarking
Pink	CHALLENGES Funding support is a challenge Marketing is necessary
Bright yellow	INNOVATIVE MODEL OF CANADIAN RETAIL MANAGEMENT DEGREE PROGRAM Innovative curriculum Access to distance education important because of particular needs of industry Retailers need to be learning organisations Program developments starts as a corporate university ESR – as a Partnership – as foundation for a network Leadership of RU and Eaton's
Lime	DEVELOPMENT PROCESS Project management framework Scope and content of retail management degree program – constituent parts

Disconfirming data is also noted; in particular, data related to Eaton's evolving status in the field (from central actor to bankruptcy) is noted, as is the prominence of interorganisational collaborations in the ESR case. The disconfirming data prompts a search in the next stage of analysis for a priori theoretical frameworks to guide the rest of the analysis. In particular, the search focuses on finding frameworks related to institutional work that involves public and private organisational actors.

Stage 2: Data Categorisation

The analysis continues with a literature search to identify theoretical frameworks and models that can guide the emerging analysis. The search focuses on finding models that can be used to categorise contextual and textual evidence of institutional work. The literature search begins by constructing a matrix (see Appendix A, Table 2.2) of the empirical studies identified by Lawrence and Suddaby (2006) that extend and elaborate the institutional work (IW) framework. Google Scholar searches are then conducted to include current IW studies that relate to the Lawrence and Suddaby (2006) research. The searches utilise the Cited by and Related Articles features provided by Google Scholar. Studies that elaborate institutional work theory and are related to the research objectives are identified and added to Table 2.2. Particular attention is paid to identifying studies related to Eaton's diminished position in the retail field and to the institutional work of interorganisational collaborations (Lawrence et al., 2002).

The resulting studies (see Appendix A, Table 2.2) are reviewed to identify useful a priori institutional theories and models. In particular, the review identifies models that specify dimensions related to:

- a) the context in which the documents were produced, including those related to:
 - interorganisational actors (Hardy et al., 2005; Lawrence et al., 2002), and
 - characteristics of strategic action fields (Fligstein and McAdam, 2012, 2011);
- b) the discursive nature of the texts including:
 - institutional work (Lawrence and Suddaby, 2006),
 - discursive institutionalism (Phillips et al., 2004),
 - genres of text production (Maguire, 2004),
 - legitimative discursive strategies (van Leeuwen, 2007), and
 - professionalising discursive strategies (Muzio et al., 2011; Arndt and Bigelow, 2005).

Based on the dimensions of the a priori theoretical frameworks/models identified above, an analytic codebook is developed and the codebook is used to further refine the data in Stage 3 (Appendix B, Table 4.8).

Stage 3: Descriptive Analysis

The data are re-coded using the analytic codebook developed in Stage 2 (Appendix B, Table 4.8), focusing on text and context. The coded data are then categorised and result in the following sets of data:

- a) A set of strategic action field characteristics based on Fligstein and McAdam's (2012; 2011) framework;
- b) A set of text producers – i.e. organisational actors and related interorganisational collaborations;
- c) A set of thirty-one discursive themes reflecting institutional work actions;
- d) A set of six genres of text production which are recognised types of communication and easily recognisable templates including;
 - Marketing;
 - Technical;
 - Popular;
 - Policy;
 - Field - with 6 distribution subsets. These are texts produced for distribution and consumption in specific constituent communities in the Canadian retail management education strategic action field. The academic community also includes 2 distinct subsets of special interest groups.

- Eaton's internal community,
- Ryerson's internal community,
- Retail sector community,
- Human Resource professionals community,
- Business community,
- Academic community,
 - Distance education (DE) community
 - Corporate university (CU) community
- Reflective-Purposive.

e) A set of discursive legitimization strategies produced to secure and maintain institutional legitimacy including:

- Authorisation: Personal
- Authorisation: Impersonal
- Authorisation: Tradition
- Authorisation: Role Model
- Moral Evaluation: Abstraction
- Moral evaluation: Evaluation
- Rationalisation: Instrumental
- Rationalisation: Theoretical

f) A set of professionalising discourses including:

- Jurisdictional Claims
- Distinct Body of Knowledge
- Educational Requirements

g) Exemplar quotations that reflect themes are tabled in order to provide credible examples of the data themes, and the frequency of their occurrence.

By the end of Stage 3, the data are explored, categorised, and described. The analysis then progresses to Stage 4, in which the data are classified and presented in various displays, and an explanatory analytic model is developed to guide the explanation of the study findings.

Stage 4: Classification Analysis

Displays of lists and tables are used wherever a summary format can provide an accessible way of classifying and presenting the data. Throughout Stage 4, displays

are constructed that classify data relevant to the research objectives. During Stage 2, various models are identified that provide the dimensions used to code the data in Stage 3. These dimensions provide the headings for displays in Stage 4. The sets from Stage 3 are merged and the resulting set is used to identify patterns in the development of the three institutional dimensions throughout the process and in the IW performed through the elements of the DIW analytic model (Figure 4.2).

4.6.2 Stages of Analysis: Interview transcripts

The analysis of the interviews progresses through the following six steps of analysis (Kvale, 2007). Firstly, the interviewees describe their experience during the interview. The discussion points are phrased to ask them specifically for their subjective experience and perceptions.

Then, because of the nature of the discussion points, the interviewees discover new relationships and meaning in what they experience(d). For example, they connect their experience with the degree development process with legitimacy and professionalism.

Thirdly, during the interview, the researcher condenses and interprets the meaning of what the interviewees describe, by reiterating, rephrasing, and summarising the information, until there is only one possible interpretation left or until the interviewees' multiple understandings of the theme are known. The researcher ensures communicative validity in the interviews by verifying her interpretations of the interviewees' answers in the course of the interviews. She follows up and clarifies the

meanings of relevant aspects of answers, thereby validating knowledge claims in the dialogue of the interview.

Fourthly, the transcribed interviews are interpreted. The transcripts are structured and clarified (eliminating digressions and repetitions, distinguishing between essential and non-essential). The analysis then develops the meanings of the interviews, bringing the interviewees' understanding to the fore, while providing the researcher with new perspectives. The analysis takes an ad hoc approach, using the same methodological approach used with the archival documentation, which features a variety of methods, including categorisation and interpretation, and results in data displays. In keeping with Grant et al.'s (2001) definition of texts as written or spoken language, cultural artefacts, and visual representations, this study regards the transcribed word documents of the interviews as textual data. The interview data corroborates the discursive themes in the archival documentation. They also reveal evidence about how the development process included the influence of different organizational cultures. This new evidence spurs the researcher to re-examine archival documentation for additional evidence regarding cultural influences.

Fifthly, one of the interviewees (the others were not available for further comment) is given the opportunity to comment on the researcher's interpretations and to elaborate on his own comments.

A possible sixth step is to include action from the interviewees on insights they gained during the interview, but this step was not suggested or adopted by any of the interviewees.

The reporting of the interviews includes a selection of verbatim interview quotes that clarify the interpretation. These quotes are used as exemplars to illustrate dimensions of the processes.

4.7 Data Management Process

The management of case data is contingent upon the development of the case study protocol, and the protocol is predicated on the research question. In this case, data management includes creating a research protocol, cataloguing the archival documentation data (Table 4.2), creating codebooks (Table 4.8), and electronically copying and filing the data. The documentation is scanned into electronic portable document format (pdf) files. The files contain an electronic copy of the data, thereby contributing to a case study database and to a reliable research process that is documented, transparent, and replicable (Yin, 2014).

The intent was to use the Research Facilitation Software, NVIVO, for coding, analysis and reporting purposes. NVIVO provides the capability to look at coded segments of data in context and it is helpful for organising different data types and sources (Richards, 2009; Bazeley, 2007). NVIVO was trialled and compared with manual data analysis. Two issues emerged from the NVIVO trial, which resulted in the decision to continue with manual data analysis. In order to use NVIVO successfully with the archival documentation, the documents need to be scanned into pdf files. However, much of the ESR archival documentation is over twenty years old, fragile, or bound in a manner that impedes scanning, so the resulting pdf files were incomplete or difficult to read. In addition, manual data analysis allowed the

researcher to become more intimate with textual qualities (i.e. appearance and presentation) of the documents. As a result, in order to thoroughly examine the documentation and to afford an intimate and thorough knowledge of the data, the analytic coding of the data was done manually and the pdf files maintained for the purpose of creating a case study database.

The manual coding begins with a reading of the documents and interview transcripts, followed by a second reading that incorporates colour coding created with coloured post-it notes and coloured pencils to link between emerging themes (see colours in Table 4.7 Emergent Themes Codebook). This second reading notes document properties and main themes, constituting a process of open coding. Upon subsequent readings, a comprehensive analytic codebook is developed. The resulting codebook is used throughout the manual coding of the data.

The resulting case study analytic process constitutes a rigorous and trustworthy research process. The following section discusses how this approach produces a valid and reliable study.

4.8 Verifying Research Quality

The design of this case study produces quality case study research with rigorous study processes and trustworthy study findings (Lincoln and Guba, 1994). The process of producing such processes and findings is referred to as verification (Morse et al., 2008) and the keys to the verification process are consistency and integrity in the study's design (Carcary, 2009).

The prevailing emphases of this study's design are to reflect on the body of evidence, critically analyse the data, and produce convincing arguments and explanations (Carcary, 2009; Mason, 2002). This process includes design tests which are used to ensure the validity and reliability of this case study, and which are incorporated in every step of the study (Morse et al., 2008; Creswell, 2003). The design tests include tests of construct validity, internal validity, external validity, and reliability (Yin, 2014; Farquhar, 2012; Riege, 2003).

This study uses related techniques for each of the design tests to ensure that processes and findings are trustworthy. The design tests and techniques are summarised in Table 4.9 and the following sections provide a discussion that describes and justifies how the case study design and related design tests are used to establish this study's validity and reliability. Notably, while these tests produce a rigorous study process and trustworthy findings, they also provide opportunities for the emergence and discovery of holistic, in-depth understandings of a real-life phenomenon, and for the building of related theory, both of which are aims of this study.

Table 4.9 Case Study Tests and Techniques for Establishing Validity and Reliability Source: Developed for this Study - Adapted from Yin, 2014; Riege, 2003

Design Tests	Case Study Techniques	Research phase in which techniques occur	Actions taken in this study
Construct validity	Multiple sources of evidence	Data collection	Use of archival documentation, interview evidence
	Chain of evidence	Data collection	Interview data taped, transcribed; multiple evidence sources entered into customised object-oriented database
	Member checking	Report writing	Data analysis summary reviewed by key informant

Design Tests	Case Study Techniques	Research phase in which techniques occur	Actions taken in this study
Internal validity	Explanation building	Data analysis	<ul style="list-style-type: none"> • DIW conceptual framework depicted with relationships between dimensions, outcomes • Data displays provide opportunities for charting, mapping, interpreting data
	Peer debriefing	Data analysis	<ul style="list-style-type: none"> • Supervised by four PhD supervisors who regularly checked, reviewed process, findings • Emergent process presented, reviewed at 2 Research Colloquiums
	Pattern matching	Data Analysis	Comparison of empirical patterns with DMI (Phillips et al., 2004) and IW (Lawrence and Suddaby, 2006) frameworks
	Cross-checking	Data analysis	Disconfirming evidence triggers
	Intellectual (Reflexive) Research audit trail	Research design	Ongoing decisions about philosophical stance, data analysis, evidence interpretation, theory distillation
External validity	Thick descriptions	Data Collection, Data Analysis	Data exemplar data base
	Analysis, coding procedures	Data Analysis	Extant literature reviewed, codebooks developed
Reliability	Case study protocol	Data collection	Protocol tracks study process
	Case study database	Data collection	Interview transcripts, research notes entered into database

4.8.1 Construct Validity

This study's construct validity refers to the extent to which the study investigates what it claims (Farquhar, 2012; Mason, 2002). In order to do this, methodical analytic measures rather than subjective judgments are used for the concepts being examined (Yin, 2014; Riege, 2003). Construct validity establishes appropriate operational measures for the theoretical concepts this study is examining (Riege,

2003). In order to establish these measures, this study uses the following well established research methods.

a) *Multiple Sources of Evidence*. This study uses multiple sources of evidence through different data collection methods and different data sources to generate explanations and a thick description of the case (Stake, 1995). The data includes archival documentation and interview transcriptions.

b) *Chain of Evidence*. This study establishes a clear chain of evidence so that a reader can reconstruct how the research progressed from the initial research question through to the final conclusions (Yin, 2014). This chain of evidence includes an explanation of the data collection and data analysis procedures, as well as a reflection on the emergent process. In particular, the chain of evidence includes citations to the case study database where the actual evidence can be found.

c) *Member Checking*. Member checking (Shenton, 2004; Merriam, 2002; Lincoln and Guba, 1985) is conducted with the original archivist, the former General Manager of the ESR. Member checking involves following up interviews to clarify and explore existing themes (Merriam, 2002). The former ESR General Manager is also an interviewee and is the only study participant familiar with the study's archival documentation data. In the process of Member Checking, he reviewed a summary of the data analysis and of the final results of the study. He answered two interview questions:

1. Did the summary reflect his experience with the ESR collaborations?
2. Why or why not?

For question #1, he responded that the study results reflect his experience. For question #2, he confirmed that the themes of the data analysis reflect the emphasis of the discursive processes and collaborations. In particular, the themes reflected that the processes and collaborations “followed the money”, thereby reinforcing the different types of DIW performed by the various collaborations and types of discursive genres (i.e. advocacy work performed through proposals). The interview was taped and transcribed into a pdf file, which is stored on a separate, encrypted USB key.

4.8.2 Internal Validity

This study defines internal validity as how accurately the study represents the reality presented in the discourse and therefore, whether the findings make sense and are credible (Shenton, 2004; Creswell and Miller, 2000; Miles and Huberman, 1994; Lincoln and Guba, 1985). In particular, this form of validity is related to the explanations that the study produces and to the authenticity of its account (Huberman, 1994). Ultimately, internal validity is a process of checking, questioning and theorising the data (Kvale, 2007) and the following processes are used.

a) *Explanation Building*. The DIW conceptual framework emerges in an incremental way throughout the stages of analysis. Diagrams of the emergent framework are included (Figures 2.1, 3.2, 5.2) in order to assist in explanation building. These diagrams depict the relationships between the framework’s dimensions and process outcomes. In addition, data displays are used throughout the data analysis to build explanations of the data. According to Miles and Huberman (1994, p.11), a display is “an organized, compressed assembly of information that permits conclusion drawing and action”. In order to present the evidence in various ways, this study utilises

different display techniques described by Miles and Huberman (1994). The study presents the evidence by creating displays, tabulating the frequency of events, and ordering the information. Displays, including time lines, event analysis, and category matrices provide support for the elaboration of each element of the study's conceptual model. The variety of display techniques provides opportunities for charting, mapping and interpretation of the data (Miles and Huberman, 1994; Ritchie & Spencer, 1994).

b) Peer Debriefing. The researcher engaged with peer debriefing throughout the study. She met regularly with supervising academics who offered scrutiny of and feedback about the case study design (Shenton, 2004). This input enabled refinement of the methods and opportunities to develop explanations of the study design, which strengthened the study. In addition, the researcher engaged in reflective commentary (including presentations at two Research Colloquiums with peers at her home University) throughout the evolution of the study, which informed the study's resulting report (Shenton, 2004).

c) Pattern Matching. Pattern matching is conducted by examining the emerging research in juxtaposition with the extant literature related to institutional work, professionalisation, legitimation, actors and agency, credentials, and retail management education. Eisenhardt (1989) argues that internal validity and deeper insight is derived from relating research to extant literature. The emergent data about the institutionalisation process are explicitly compared to the DMI (Phillips et al., 2004) and the IW (Lawrence and Suddaby, 2006) frameworks. Furthermore, validity is ensured through the diagrams of the conceptual and analytic frameworks that

provide explanations of the emergent relationships between variables and outcomes. As a result, the presented data are linked to categories of prior and emerging theory.

d) *Cross-checking*. This study's attention to disconfirming evidence leads to cross-checking of findings in the data analysis phase. The analysis explicitly incorporates multiple perspectives of reality, and provides an iterative appraisal of the ongoing research process (Shenton, 2004; Creswell and Miller, 2000; Miles and Huberman, 1994). The analytic process begins with familiarisation with the data, which establishes preliminary themes. When disconfirming evidence is surfaced, it cues the next stage of the analysis. Alternate explanatory models are found (through literature reviews) and incorporated into the code book to use as a guide for the ensuing analysis. An example is the analysis of the producers of the texts. The first stage of analysis surfaces themes about Eaton's centrality in the retail field and their power and identity in the various collaborations; however, their bankruptcy is disconfirming evidence. The evidence prompts a thorough literature search for models that can explain the nature of collective identities (Hardy et al., 2005) and interorganisational collaborations (Lawrence et al., 2002). The recognition of disconfirming evidence and the resulting account increases the study's credibility because it presents a complex rendering (Creswell and Miller, 2000; Miles and Huberman, 1994).

e) *Intellectual (Reflexive) Research Audit Trail*. The researcher gives an account of all research decisions and activities throughout the study, thereby providing a reflexive research audit trail of her intellectual decisions (Carcary, 2009; Mason, 2002; Lincoln and Guba, 1985).

The audit trail begins with the search for a philosophical stance, which was informed by significant reading on research methodology and several research methods courses. The researcher initially approached the study from a critical perspective, based on the question of how power was instrumental in the collaborative processes. This initial position was also predicated by the question of the legitimacy of a career in retail management. However, she determined that the evolution of the degree was constituted by a number of influences. Notable amongst these was the shift in Eaton's trading status and power, which indicated to the researcher that the study needed to be able to examine the complexities of the degree development processes. This realisation led her to examine literature related to process ontologies (Langley et al., 2013), and to finally determine that the most appropriate ontological perspective for this study was that ever-evolving processes are the reality being examined.

The epistemological perspective was easier to discern once the decision about the ontological perspective was made. The reality of processes can be discerned and investigated through discourses produced throughout the processes. The search culminated with the decision that an interpretivist position is appropriate for this study, thereby providing a holistic, contextual approach.

Discourse analysis is a widely used framework in inductive theory development, so the decision to use it as the analytical approach was appropriate. However, although critical discourse analysis focuses on the dynamics of the power relationships in collaboration, the researcher found it difficult to reconcile how this focus would answer the research question. The decision was therefore made to use

organisational discourse analysis as an analytic approach because it provides a framework for analysing dynamics of institutional work through textual production, distribution and consumption. This approach also provides a way to examine how the meaning of a new organisational practice is discursively produced.

Because the study takes an interpretivist perspective, the researcher decided to interpret the evidence through an iterative process that involved interaction with and reflection on the body of evidence and extant theories. For example, she used an iterative process to determine a way to view the nature of the field of inquiry.

Because the collaborative process involved interests from a fragmented field (retail management) and from institutionalised fields (university and government), she found it difficult to frame the influences and characteristics of the development process.

However, after conducting Stage 1 of the analysis, she went back to the field theory literature and decided that Strategic Action Field theory provided a way to view the heterogeneous nature of the retail management education field. This decision led her to re-examine the multiple forms of IW evident in the data. Although she had observed multiple Creating forms of IW after the first Stage of the analysis process, she recognised that the multiple interests in strategic action fields may involve different forms of IW (i.e. maintaining and disrupting). After debriefing with her supervisors, she then decided to re-examine the data in Stage 2 for evidence of multiple forms of IW.

Finally, as the iterative process progressed, the researcher made ongoing decisions about the distillation of new theory, and thereby produced iterative versions of this study's emerging conceptual framework.

4.8.3 External validity

External validity is the capacity to which this study's findings can be replicated beyond the scope of this case and can be generalised into a broader theory (Miles and Huberman, 1994).

a) Thick Descriptions. As Stake (1995) noted, transferability and generalising to other cases is secondary to understanding the patterns of the single case through a thick description of multiple realities. This study focuses on determining the saturation of the data, and whether coherent themes are established that can evolve into a persuasive narrative, therefore providing a thick description of the research. A thick description is not just a description of events; it also includes the perceptions presented by actors involved with the case (Stake, 1995). Exemplars from the data are therefore culled to provide thick descriptions of the research, thus emphasising the rigour of the analysis (Eisenhardt and Graebner, 2007).

b) Analysis and Coding Procedures. This study utilises a comprehensive analytic codebook (Table 4.8), and takes the perspective that coding organises data and helps to discover patterns that might not be immediately visible. Farquhar (2012) links coding with reducing large quantities of data into formats that enable reliable, credible analysis, whilst Richards (2009) views coding as the process of retaining data records until they are fully understood. The coding process in this study reduces data into manageable formats and is a means for retaining data.

This analysis uses a combination of objectivist and heuristic codes. Objectivist codes are representations of the facts described in the data (Seidel and Kelle, 1995). They

are reliable representations because they are unambiguous and consistent (i.e. the words, 'Canadian retailing' are used as an objectivist code for retailing in Canada). They are adequate surrogates for the text they identify, the text is reducible to the codes, and it is appropriate to analyse the relationships amongst the code words (Seidel and Kelle, 1995). Heuristic codes are used to capture data elements that are ambiguous, while providing indications of relationships (i.e. ESR is presented with a Retail Council of Canada award, which is an indication of its moral legitimacy).

4.8.4 Reliability

Reliability refers to how consistently other researchers would be able to replicate the study's processes and determine similar findings (Riege, 2003). This study's reliability is established by the thorough reporting of the study's processes that show stability and consistency in the inquiry process.

a) Case Study Protocol. The research design and protocols and the data analysis design provide strategic and operational details of the study process. This study provides a thorough methodological description (Farquhar, 2012; Creswell and Miller, 2000), including creating a case study protocol, cataloguing and justifying data sources (Tables 4.3 and 4.4), creating codebooks (Tables 4.7 and 4.8), creating an interview guide (Figure 4.3), cataloguing data, and making electronic data files. In particular, the theories and ideas behind each phase of the study are thoroughly described.

b) Case Study Database. The interview transcripts and researcher notes are contained in separate encrypted USB keys. Not all of the archival documentation is

contained in the researcher's files, because some documents were too fragile to be scanned. However, all archival documentation is available through the Province of Ontario archives at <http://www.archives.gov.on.ca/en/index.aspx>. In addition, the data sources used for the analysis are cross-referenced, so that readers are able to discern the basis of the analysis and findings.

The preceding section discusses the quality considerations related to the rigour of the analysis. The next section discusses the ethical considerations made during this study.

4.9 Ethical considerations

All research should incorporate ethical considerations of the broader nature of the research and the detailed elements of data collection and management. This study utilises preliminary agreements and reflective documentation about the role of the researcher in order to address ethical considerations related to the research (Miles and Huberman, 1994). The agreements are described below, as is the role of the researcher.

4.9.1 Preliminary Informed Consent

As described in section 4.5.2, respondents provide informed consent prior to being interviewed. The consent agreement discloses details about the researcher and the purpose of the study. Their voluntary participation and anonymity are confirmed, as are the data collection methods and sources, recording and storage processes, and feedback processes. Importantly, the interview respondents are given the choice to

refuse to participate or withdraw at any time, thereby ensuring that data is offered freely.

4.9.2 Role of the Researcher

The following section offers a description of the researcher's experience with the case and of her reflections about how her experience relates to the research approach. In her current faculty role, she teaches retail management students in the degree programme that resulted from the development process described in the case study.

Her relationship with Ryerson University began in 1993, which was the same year that Ryerson transitioned from a Polytechnic University to a research university. The CE Faculty was developing a Training and Development certificate programme, and the CE Director asked her to design and deliver one of the courses. Over time, she delivered a number of courses in different intensive formats for Ryerson, including Organisational Behaviour.

In 1994, the CE Director asked her to deliver the Organisational Behaviour course that CE was delivering to Eaton's employees. The credit course was a pilot. All of the students were Eaton's employees and the course was offered in a unique week-long intensive format, featuring a final project oriented to the Eaton's workplace. Over the next several years, she was involved with the design and teaching of a number of courses across Canada, as part of the Eaton School of Retailing. Increasingly, they included employees from other retailers and Eaton's suppliers.

While the Eaton's organisation sponsored the ESR development, the iconic Canadian department store chain struggled and eventually declared bankruptcy in 2000. The researcher continued to teach the courses which became part of new Ryerson CE certificates in Retailing and Services Management and then authored and delivered some of the courses in a distance education format. Eventually, the certificates formed the basis for the retailing courses of the four year Bachelor of Commerce degree in Retail Management. The researcher became a full time Assistant Professor in the Ted Rogers School of Retail Management (the current name of the degree) in 2008.

The researcher's experience was helpful during the data collection phase of the study because she knew who the main ESR actors were and that they might have knowledge of or access to data. As a result, she was hopeful about using the ESR development as a case. Further, when she realised that the ESR General Manager had accumulated and saved an archive of the documentation from the process, she realised that the degree development could be examined as a discursive process. Although she was aware that the retail management degree is unique in Canada, she had not been aware of the unique nature of the collaborative degree development process. It was only after the first scan of the documentation that she realised that the case presents an opportunity to examine the complexities of the situation.

The researcher's curiosity about the collaborative practice was piqued by her experience and also by the opportunity to examine how the meaning of the practice had been discursively produced.

4.10 Chapter Four Summary

In this chapter, the case study approach, its linkages to discourse analysis, the research design of the case study, data collection, data management and quality, and ethical considerations are discussed.

Moreover, the discussion shows how this study produces a thick, rich description of the case's setting, participants, and themes. Through the analysis of the archival documentation and the key informant interviews, a holistic view of the degree development process emerges. The data reveals the complex mechanisms and multiple relationships that constituted the development of this innovative practice. Furthermore, the section discussing the research design and protocols presents the emergent analytic framework which is consistent with this study's purpose, theoretical perspective and, ultimately, the research question it answers.

The next Chapter provides a comprehensive discussion of the analysis of the case study data.

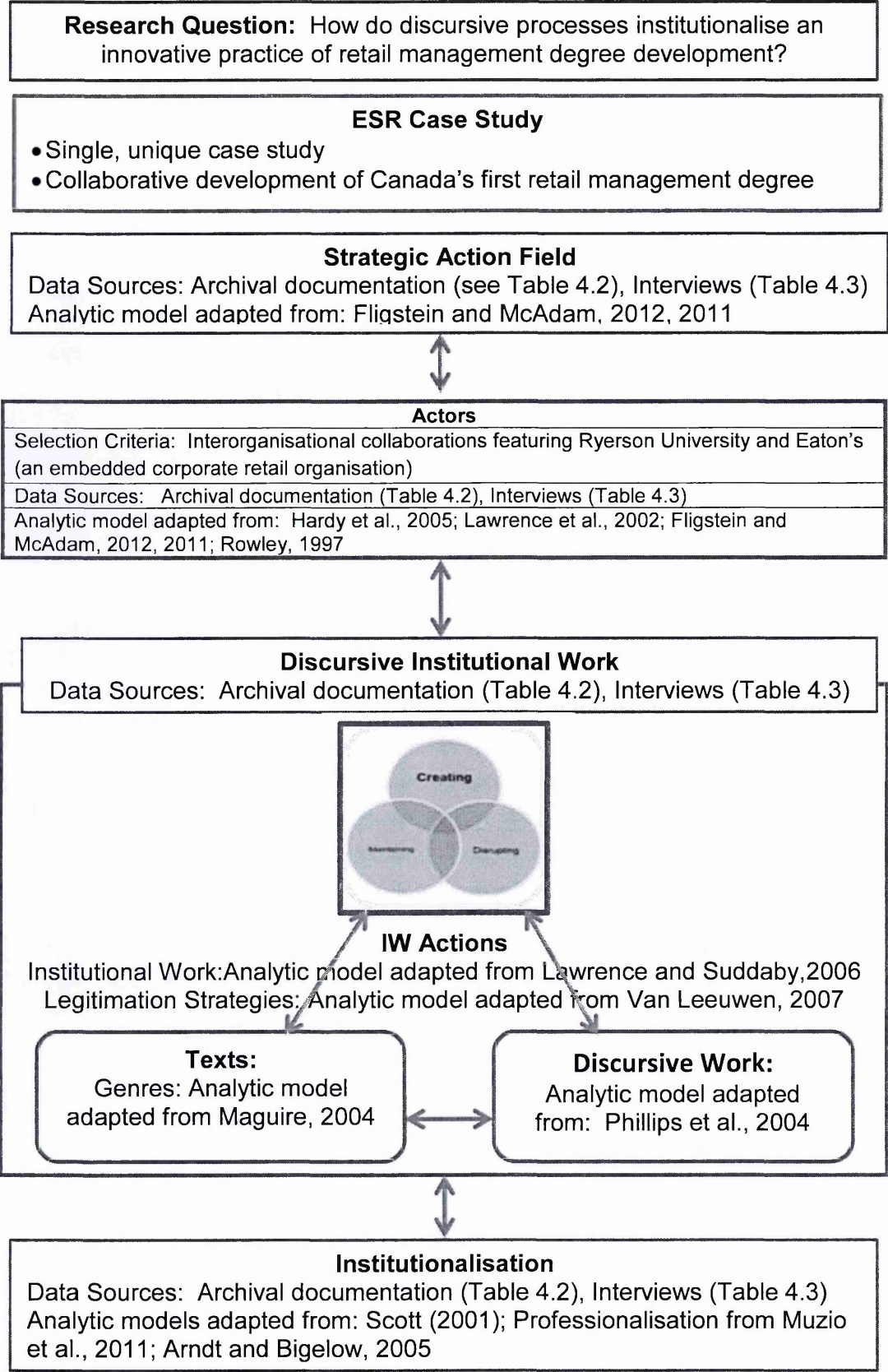
Chapter 5: Data Analysis

5.1 Introduction

Chapter Five will analyse the study data and present the results that have theoretical implications. Given that the purpose of this study is “to understand the discursive processes that constitute the institutionalisation of an innovative collaborative practice of retail management degree development” (see Figure 3.1), this analysis investigates the discursive processes evident in the ESR case study. This chapter therefore focuses on the relevance and connections of the analysis with the study’s emerging conceptual model.

This chapter is organised according to the elements presented in the analytic framework developed in Chapter Four (see Figure 4.2) and each section in this chapter includes discussions of the patterns in evidence from the ESR case study. The chapter sections include descriptive displays (i.e. tables and figures) and discursive exemplars related to the patterns. The data sources of the evidence are the case’s archival documentation and interviews. Appendix B, Table 4.2, provides a catalogue of the archival documentation and its numbering of the documents is used to identify the documents from which exemplars are drawn. When exemplars from interviews are used, the codes from Table 4.3 are used to identify the source. When the exemplars includes specific illustrations of patterns, they are **bolded**.

Figure 4.2 Discursive Institutional Work: An analytic framework (Source: Developed for this study).



The first section presents a discussion of the discursive evidence of characteristics of a Strategic Action Field. The analysis of the patterns in evidence is based on the mechanisms determined by Fligstien and McAdam (2012, 2011).

The second section provides an analysis of patterns in evidence of the characteristics of the actors who produced texts. The actors are classified to determine who the individual organisational actors were and what interorganisational collaborations were formed during the time frame of the case. Organisational characteristics from models developed by Rowley (1997) (see Section 2.5.2) and Fligstein and McAdam (2012, 2011) are used to analyse the characteristics of individual organisations, and elements from models developed by Hardy et al. (2005) and Lawrence et al. (2002) (see Section 2.5.2) are used to analyse the characteristics of interorganisational characteristics.

The third section presents an analysis of evidence of Institutional Work (IW) actions in the case. The analysis utilises the elements of Lawrence and Suddaby's (2006) model of IW (see Table 2.1) to produce a discussion of IW discursive themes, which are then analysed according to dimensions of legitimation strategies based on van Leeuwen's (2007) model (see Section 2.10). These discursive themes also provide a common reference for discussions of aspects of discursive institutionalisation in other sections.

The next section provides an analysis of evidence of discursive work performed by the IW themes identified in Section 5.4. Phillips et al.'s (2004) model of discursive

institutionalisation (DMI) provides dimensions that are utilised to analyse discursive patterns evident in the case's archival documentation and interviews.

The fifth section presents an analysis of the texts produced throughout the case study. In particular, the analysis is based on the genre classifications developed by Maguire (2004) (see Section 2.9) to identify patterns in the production and distribution of the texts.

The next section provides an analysis of the discursive evidence of the of the three elements identified by Scott (2001) as pillars of institutionalisation – regulative, normative and cultural-cognitive elements (see Section 2.2.1). The analysis of the patterns of evidence of cultural-cognitive elements is based on dimensions of managerial professionalisation developed by Muzio et al. (2011) and Arndt and Bigelow (2005) (see Section 2.11).

The seventh section presents the explanatory analytic model which portrays the operationalisation of the analysis, as it progressed through the various parts of the model and the final section then presents a summary of the analysis produced in this Chapter.

5.2 Analysis of Patterns in Strategic Action Field Characteristics

The analysis begins with discussion of the patterns found in the data that provides evidence of characteristics of a strategic action field. The discursive data is categorised according to evidence of the three change mechanisms that characterise strategic action fields – actors identify threatening change, the constituent actors have

mobilising resources, and the actors engage in innovative action (Fligstein and McAdam, 2012, 2011). Patterns of the mechanisms' evidence are categorised and presented in Table 5.1.

Table 5.1 Strategic Action Field Characteristics

Strategic Action Field Mechanisms (Fligstein and McAdam (2012, 2011))	Canadian Retail Management Education field	Source
Threats	Threat from US/global retailers	Exogenous
	Dearth of Canadian retail management education	Endogenous
	Decline in university funding	Exogenous
	Eaton's viability and potential demise	Endogenous
	Negative perceptions about retail management as a career	Exogenous and Endogenous
Available Resources	Financial	Institutional and Corporate Actors
	Political Advocacy	Corporate Actors
	Degree granting authority	Institutional Actors
	Degree programme development	Institutional Actors
	Process Champion	Institutional and Corporate Actors
	Embedded Centrality	Corporate Actors
Innovative Actions		
Consumer service sector-specific degree		
Co-production of degree curriculum with industry		
Corporate-University Collaborations		
Innovative degree delivery mechanisms		
Development of competencies		
Degree development originating in Faculty of Continuing Education		

The data presents evidence of five threats perceived by actors in the field. Two of the threats originate with sources outside the field (i.e. exogenous), two originate within the field (i.e. endogenous) and one originates within and outside of the field. There is evidence that the constituent actors have access to five types of mobilising resources, all of which are available within the field. There is also evidence that these actors engage in six particular types of innovative actions. The evidence of these mechanisms is discussed in the following sections.

5.2.1 Threats

The analysis found discursive evidence that the actors that constituted the development of the Canadian retail management education field determined that there were five threats which justified the development of the field. The first exogenous threat came from the infiltration by US and global retailers of the Canadian marketplace. The following exemplar illustrating how this threat was perceived, was made by the Chairman of the T. Eaton's Company in an article in a popular press magazine.

“The education of Canadian retailers will help this country **battle** the current **influx of American category killers**.”...Document #78

The second threat is that there is a dearth of Canadian retail management education. This threat is an endogenous one, because it originates within the field. Discursive evidence of this threat relates it to the first threat and an exemplar comes from the *Needs Analysis of Canadian Retail Education*, which specifically refers to the lack of university-level retail-specific Canadian education.

“the rapid infiltration of US-based retailers into the Canadian marketplace coupled with the **lack of university-level retail-specific education in Canada**, point to an urgent need for the development of appropriate educational programming for the Canadian retail sector.”.... Document #6, p.3

The third threat also comes from an endogenous source because it refers to how the decline in university funding affected the development of university programming.

The Eaton Legacy is a text produced to document the ESR degree development process and it provides the following exemplar about the decline in university funding.

“the **university was experiencing a lot of funding cutbacks**, so the availability of funds for curriculum development and for new programming was something that you didn't want to put off indefinitely.” ...Document #3, p. 71.

The viability and potential demise of Eaton's presented a fourth threat. As Eaton's was a dominant actor in the Canadian retail management field (McQueen, 1999) and

a founding member of the ESR partnership, this was an endogenous threat, and it is evident in the following exemplar from the interview with the Ryerson CE Director who participated in the ESR case.

“The folks at Eaton’s at the time were struggling for survival...huge competition had emerged in the form of Wal-Mart and some of the other innovations that came with that whole process. The Eaton’s folk really decided that they needed to concentrate on **developing a learning environment** for their team that was their only hope in terms of **getting out of the mud.**” ...Interview C, Lines 31-37.

Finally, negative perceptions about retail management as a career were perceived to be a threat because they were also linked to assumptions that retail management education was therefore unnecessary. These perceptions are evident from exogenous sources and also from within the retail sector (i.e. endogenous sources) as evident in these exemplars from the interview with the Director of the Retail Council of Canada (RCC).

“it’s called the “accidental career”...Lines 53-58, “there are a lot of challenges, **one with the students themselves and two, their friends and family and colleagues or friends and family and sometimes the school’s themselves are not always supportive of a career in retail...Three is the lack of support from the retail community itself.**”...Lines 72-78

In order for a strategic action field to develop, constituent actors need to have access to resources so they can mobilise action in response to the threats they have identified. The following section provides a discussion of evidence of mobilising resources.

5.2.2 Available Resources

The actors in this field had access to six types of resources which enabled them to perform discursive degree development actions in response to the identified threats. The resources are simultaneously available to the corporate and institutional actors who constituted the retail management education field (see Section 5.3, Table 5.2).

The first type of resources was financial. These resources were provided by a) the federal and provincial governments (i.e. institutional actors), b) the larger retail sector (i.e. corporate actors), and c) Eaton's (i.e. corporate actors), and the resources are described in the following exemplars from a) the interview with the ESR General Manager b) the Summary of Funding document, and c) the interview with the Ryerson CE Director of the ESR.

a) "we were able to flow something just over \$14 million into the development and delivery of programming. That included **contributions from every provincial government across the country as well as the federal government**, both CIC and HRSDC at the time."...Interview C, Lines 72-76

b) "In the course of developing the Eaton School of Retailing, the following sources of **Government funding** were secured. Each of the following initiatives was also supported by the **Retailing, Manufacturing and University sectors**, where indicated."...Document #49, p.1

c) "The program **would never have gotten off the ground if we didn't have the Eaton family** because without the family supporting the program and their foundation supporting the program... because we needed that initial money... because you see what happens is with the federal and provincial government, you've got to match it all."...Interview A, Lines 302-308

The second type of resources is political advocacy, with which the actors in the field mobilise political support for countering the threats. In this case, personal advocacy was made by the Eaton's Chairman to the Canadian federal government to secure its support for retail sector-specific education. The following quote from the interview with the Ryerson CE Director responsible for the ESR, shows an example of this advocacy.

"Then one day John Craig (Eaton) got into his plane and flew to Ottawa and sat down with the minister and a couple of senators. The next day retail was promoted from not being on the list of priorities at all for the federal government in terms of sector councils and sectoral work to being a very high priority...**his advocacy was just so critical** in terms of how he really hurled himself into the political and economic sides of getting the project funded."...Interview C, Lines 63-39.

There is evidence of the third type of resources, degree granting authority, provided by Ryerson University, an institutional actor. Without this authority, the actors would not be able to respond to the paucity of university-level retail education by developing a new degree. The following exemplar from *The Eaton Legacy* illustrates how this resource was available through Ryerson University.

“...stressed Ryerson’s ability as an applied university to work with an outside entity to develop academically rigorous university credit courses **and offer a degree**, unlike its academic counterparts, community colleges or private educational institutions.”...Document #3, p. 23.

The analysis shows that that the fourth type of resources, degree development resources, including a) existing courses and faculty, b) flexible curricular structures and c) retail management education content, were available and flexible enough to be able to form a retail-specific degree. Exemplary evidence of these resources provided by Ryerson is found in a) *A Whole New Way*, which was a document produced to chronicle the development of the retail management degree, b) the interview with the Ryerson CE Director and c) a newsletter produced for CRMEP participants.

a) “Ryerson is **uniquely equipped with the academic resources** to respond to the demand for post-secondary education in retail and services management. The Curriculum Development Committee identified up to 35 professional and professionally related courses from the Faculties of Business and Applied Arts that are useful, at least in part, for the development of the professional education program in Retail and Services management. This indicates the strength of the Ryerson faculty in this area.”...Document #12, p. 12.

b) “They initially talked to McMaster and then they talked to folks at U of T and the folks at U of T said “we can’t possibly do what you want to do, **we’re too rigid but go talk to the people at Ryerson**”...Interview C, Lines 37-44

c) “The Canadian retail sector has provided invaluable advice and support to the Program by helping to **define the kind of management education that is needed**.”...Document #30, p. 2

In addition, the analysis shows that Ryerson had degree development resources in the form of proposal writing discursive resources. The Ryerson CE Director was a former Deputy Minister of Education in Saskatchewan and therefore, Ryerson was able to provide proposal writing resources under his Directorship (Interview with ESR General Manager).

“... was able to help me **design and write proposals to the federal and provincial governments for funding**”. ...Interview A, Lines 110-120

The fifth type of available resources is evident in the form of process champions in the institutional and corporate organisational actors who helped to mobilise action.

The Eaton Legacy provides exemplary evidence of the presence of process champions in a) Eaton's (corporate) and Ryerson (institutional actor) and b) the federal government (institutional actor).

a) “ We were fortunate that we had the **support of the Eaton family**, especially John Craig and George Eaton, as well as the Chief Executive Officer, Tom Reid. But like anything, **you've got to have champions on the other side**, and we had Phil (Schalm, C.E. Director), Dennis (Mock, Vice President Academic) and Marilyn (Booth , C.E. Dean) at Ryerson who got things moving.”...Document #3, p. 31

b) “credits Matthew Blue as being the champion of the retail cause within HRDC. You have to have a **champion within government** who's going to be your intermediary or go-between and really sell the thing”...Document #3, p.89

The sixth type of resources mobilised in this field's development, are the influences and interests associated with Eaton's embedded centrality in the Canadian retail sector. The analysis shows that Eaton's had a) controlling influence with suppliers, and b) representative interest in the entire Canadian retail sector. These exemplars from a) the interview with the CE Director and b) an article in the *Globe and Mail* (a national Canadian newspaper) illustrate the presence of these resources.

a) “that was largely funded through suppliers to **Eaton’s...they simply went to their various suppliers** and said “this is what we’re putting in this process, what are you putting in”....Interview C, Lines 79-85.

b) “I have to give Eaton’s credit, its concern was not only to raise the level of professionalism within its own organization but **within the entire retailing sector in Canada.**”...Document #65, pp. 44-45.

This analysis of the field’s resources also shows that there was a pattern related to how the influences of embedded actors shifted during the degree development process. Although Eaton’s brought the influences of their embedded centrality to this emergent field, the field’s ability to mobilise innovative actions was not dependent upon Eaton’s central influences. In particular, the degree development process was structured to inoculate against shifts in the influences of embedded corporate actors by a) situating the process within the jurisdiction of an institutionalised actor and b) expanding the fields’ membership to include multiple embedded corporate actors in interorganisational collaborations. The following exemplars from a) an article in one of Ryerson’s internal newspapers and b) the interview with the ESR General Manager illustrate these two accommodating structures.

a) “The future of Canada’ largest retailer is uncertain, but the **retailing classes Eaton’s helped develop at Ryerson could survive without it.** That’s been our intention, and it’s been Eaton’s intention from the very beginning, that **it not be depended on a single company**”...Document #18.

b) “It couldn’t just be the Eaton’s of the world that were supporting the program. We needed **other retailers to make the program go.** We knew eventually that if Eaton’s did bow out of the program and let Ryerson take it over, it would never grow. Of course it has grown to this degree.”...Interview A, Lines 246-249

When actors have access to the resources necessary to mobilise action in response to determined threats, they are able to collaborate to perform innovative actions (Fligstein and McAdam, 2012, 2011). Discursive evidence of innovative actions in the ESR case is discussed in the following section.

5.2.3 Innovative Actions

In response to the threats they have mutually identified, the actors in the field develop six types of innovative actions. The first type is innovative degree development actions oriented to developing a sector-specific degree in retail management. The following exemplars from a) a trade publication and b) *Retail Management Education: A Review of Current Undergraduate Programs* illustrates the unique nature of this process.

a) "This is a **Canadian first**-a university-level professional program designed from the ground up for retail management." ...Document #75

b) "**Undergraduate programs devoted specifically to retail management education are the exception rather than the rule.** Most of the programs offered in North America as fashion merchandising options have evolved with schools of Human Ecology, Human Environment or Consumer Studies."... Document #5, p. 2.

Another innovative action is the co-production of degree curriculum with industry.

The following exemplars illustrate how industry involvement with degree development processes was innovative and how the actual co-operative microprocesses constituted the degree development. The first a) is from a newsletter produced by and for the participants in the degree development process and the second b) is from a proposal produced for the creation of the curriculum development process.

a) "In order to develop the course content for Canada's first bachelor's degree in retail management, **it was essential that retailers themselves played an active part in the curriculum development process – usually reserved for university faculty only.**"...Document #30, p. 1.

b) "The development of curriculum for retail education is a complex process. A **co-operative sectoral approach must be taken to gather and organize the collective knowledge of the Canadian retail industry and transfer this body of knowledge into the university system.** This industry-based knowledge must then be integrated with relevant material from more traditional academic disciplines to form a coherent program of study."...Document #53, p.20

There is also discursive evidence that the formation of the ESR corporate-university collaboration was an innovative action oriented to constituting the degree development process. The following exemplars are from a) *Getting the Most out of Learning*, the document produced to evaluate the ESR programme and b) a newsletter article published by the Association to Advance Collegiate Schools of Business (AACSB).

a) "The Eaton's/Ryerson alliance is **unique in North America, both in its purposes and its approach to the corporate/university partnership**. It stands, in fact, as a whole new model of collaboration that changes the way a university carries out its business and that business invests in individual and corporate learning."...Document #44, p.6

b) "...this is going to take an attitudinal shift on the part of many universities that have gotten used to a certain relationship with industry. That relationship was more of accepting corporate contributions and having the discretion to determine how it would be spent. This is a **totally different model of collaboration**" ...Document #77, p.7

The analysis also shows that actors developed innovative degree delivery mechanisms. These mechanisms included course scheduling options and distance education delivery that facilitated students across Canada. Discursive evidence of these mechanisms is found in *A Whole New Way*.

"Courses have been developed within a structure that **facilitates delivery in a variety of formats across Canada**, including three hours per week over 13 weeks; one-week intensive residential programs; and electronically based and other distance education formats." ...Document #12, p. 19.

The fifth innovative action was an emphasis on developing a) competencies and b) occupations skills standards during the degree development process. Evidence of these actions is shown in the following exemplars from a) *The Eaton Legacy*, and b) an article in *Corporate University Review*.

a) "the Program Advisory Committee devoted a considerable amount of time to **defining the skills, knowledge and attributes needed by career retail**

management professionals from a “top management” perspective. This was critical to the development of the curriculum.”...Document #3, p. 79.

b) “the project is the first step in an effort to create a nationwide **retail skills certification process** and formal education in retailing.”...Document #76, p. 8.

Finally, the genesis of the degree development process was situated in Ryerson’s CE Faculty, which was an innovative action. Evidence is found in the following exemplar from Jeannie Meister’s (1999) book *Corporate Universities: Lessons in Building a World-Class Work Force*, in which she discussed the ESR case.

“To date, the Eaton’s/Ryerson partnership has produced a university program in retail/merchant management that is **unique in philosophy, design, and delivery. Turning on Continuing Education’s ability** to create links with academic divisions, this partnership uses the university’s infrastructure”...Document #81, p.5

In summary, the data provides evidence of multiple endogenous and exogenous influences related to the consolidation of the strategic action field of Canadian retail management education. These include multiple threats and available resources. These influences contribute to multiple innovative actions related to the development of a Canadian retail management degree through a collaborative process.

The actors in the strategic action field performed innovative degree development actions in the ESR case. The following section examines the characteristics of the actors presented in the data.

5.3 Analysis of Patterns in Characteristics of Actors

Discursive evidence of the characteristics of the actors is provided by membership lists (i.e. NSAS), websites (i.e. RCC), proposals (Industrial Adjustment Services (IAS)), and reports (i.e. *The Eaton Legacy, A Whole New Way*).

The actors are first categorised according to the individual organisations that participated in the degree development process (see Table 5.2, Individual Organisations Legend). These organisations are then arranged according to their level of institutionalisation.

The interorganisational collaborations that were formed throughout the process are then identified and their purpose is categorised (see Table 5.2, Interorganisational Collaborations Legend). The collaborations are arranged according to the date they were formed (see Table 5.2) and the individual organisational members of each collaboration are then identified.

The resulting categorisation is presented in Table 5.2. Table 5.2 is followed by discussions of the characteristics of the a) individual organisations and b) interorganisational collaborations portrayed in the Table.

Table 5.2 Actors: Individual Organisations and Interorganisational Collaborations Over Time

		Level of Institutionalisation														
		Individual Organisations														
Date	Interorganisational Collaborations	Fed. Gov't	Prov. Gov't	Univer- sities	Ryerson University		Com. Clgs	Union	Sup- plier – Canada Post Corp	Industry Assoc.		T. Eaton Co. Ltd.		Bell Canada	Retail- ers (i.e. Sears Nygard)	Sup- pliers
					Ryerson faculty	C E				RCC	Other	ESR	Eat- on's			
1993 n=1	ESR					X							X			
1994 n=5	Senior Mgt Group					X							X			
	Phase 1 Adv. Cmtee					X							X			
	Vision 2000 Cmtee	X											X			
	Curric.Dev't Cmtee					X							X			
	CE Retail & Serv. Sector Adv. Cmtee								X	X	X	X	X		X	X
1995 n=1	IAS	X							X	X	X	X	X		X	X
1996 n=3	CRMEP					X							X			
	Retail Mgt. Degree Prog. Adv. Cmtee		X	X			X	X			X		X		X	
	Eaton Chair	X												X		
1997 n=1	NSAS	X	X	X			X	X	X	X	X	X	X	X	X	X

Individual Organisations Legend:		
Fed. Gov't=Human Resources Development Canada (HRDC) federal government department	Ryerson faculty=faculty from Ryerson academic Faculties CE=Ryerson Faculty of Continuing Education	RCC=Retail Council of Canada Industry Assoc.=Industry Associations
Prov. Gov't=Ontario Ministry of Training, Colleges & Universities	Com. Clgs=Colleges of Applied Arts & Technology (CAAT)	ESR=Eaton School of Retailing Eaton's=Eaton's corporate department
Universities=Canadian universities (other than Ryerson)	Union	Bell Canada Retailers=Sears, Nygard, Levis
	Supplier-Canada Post Corp.=Canada Post Corporation	Suppliers=miscellaneous

Interorganisational Collaborations Legend:

Abbreviation in Table	Collaboration Name	Purpose
ESR	Eaton School or Retailing	To manage Eaton's vision of retail education described in strategic plan To manage partnership with Ryerson
Senior Mgt. Group	Senior Management Group	To provide overall guidance and direction.
Phase 1 Adv. Cmtee	Phase One Advisory Committee	To advise Senior Management Group on aspects of Phase One activity
Vision 2000 Cmtee	The Eaton School of Retailing: Vision 2000 Committee	To co-ordinate and monitor Phase One of development of the ESR Succeeded by IAS and NSAS initiatives
Curric Dev't Cmtee	Curriculum Development Committee	To define overall curriculum design, outline certificate and degree credit courses, advise on delivery options and evaluate existing courses for credit.
CE Retail & Serv. Sector Adv. Cmtee	Continuing Education Retail and Services Sector Advisory Committee	To advise on development and marketing of certificates
IAS	Industrial Adjustment Services Initiative in Retail Management Education	To research demand for university-level retail management education, distance education technology, promotion of ESR, and development of occupational skill standards and professional certifications To build on work of Eaton Vision 2000 Committee
CRMEP	Canadian Retail Management Education Program	ESR renamed CRMEP in 1996 and located in Ryerson's CE division. To manage retail certificate programming
Retail Mgt. Degree Prog. Adv. Cmtee	Retail Management Degree Program Advisory Committee	To advise about curriculum, marketing of retail management degree To ensure retail industry input used throughout degree curriculum development process
Eaton Chair	Eaton/NSERC/SSHRC Chair in the Management of Technology in Retailing	To create bridge between university system and private industry to foster excellence in retail/manufacturing/ service sectors, through dissemination of results-oriented research and information profiling the strategic significance of Canadian retail economy.
NSAS	National Sector Adjustment Services Committee for Career Awareness and Technology-Enhanced Learning in Retailing & Occupational Skill standards and Certification	To build industry support for occupational skill standards and develop standards for sales associate and entry-level management positions. To develop and implement strategies for marketing retail education and retail as career choice. To develop evaluation model for information technology media used in distance learning environment

a) *Characteristics of Individual Organisations:* There are fifteen individual organisations that participated in one or more collaborations throughout the process. The individual organisations are positioned on a continuum according to their level of institutionalisation with organisations of the state (i.e. federal and provincial government organisations, universities) having a high level of institutionalisation, and individual suppliers (i.e. embedded corporate actors) having a low level of institutionalisation.

Five patterns in levels of institutionalisation of the individual organisations are evident. The first pattern is that highly institutionalised organisations possess high levels of formal authority (Weber, 1968) which is vested through the state (DiMaggio and Powell, 1983; Meyer and Rowan, 1977). The Canadian federal government has formal authority for sector-based education through the Sector Council Program (http://www.hrsdc.gc.ca/eng/workplaceskills/sector_councils/index.shtml). Their authority extends to national occupational certification and accreditation, but does not include the authority to grant degrees.

In Canada, the authority to grant degrees is provided by provincial governments which have formal authority in post-secondary education. Universities in Ontario are thereby authorised to grant degrees by the provincial Ministry of Training, Colleges and Universities (<http://www.tcu.gov.on.ca/eng/about/role.html>), which was the authority by which Ryerson University was able to develop this degree.

A second pattern evident in this case is that the Canadian universities that participated (other than Ryerson) were more highly institutionalised than Ryerson. In

particular, a higher level of institutionalisation was evident in universities that had strong research and theoretical traditions and programming. Degree development processes in these universities were embedded in academic faculties, and partnerships were focused on research-oriented collaborations. In comparison, Ryerson had a history of offering applied programmes and had not yet established itself as a research institution. The higher level of institutionalisation in more traditional universities is illustrated in the following exemplar from a CRMEP newsletter distributed during the degree development process.

“Many universities could not have offered to work with a corporation or a sector to develop a degree program with the kind of participatory framework we were able to offer. There would have been huge resistance. We actually had retailers on our curriculum committee. That was **controversial in an applied university like Ryerson; how much more so it would be in a more theoretical university!**”...Document 30, p.4

A third pattern is that Ryerson University had two types of organisations participating in the process; there were participants from academic Faculties and also from the Faculty of Continuing Education (CE). The academic Faculties at Ryerson were more institutionalised than the CE Faculty as evident in the following exemplars from a) the interview with the first Director of Ryerson’s Retail Management degree, who had been involved with the degree development process, and b) *The Eaton Legacy*.

a) “But another reason was that the School of Business at Ryerson sort of wasn’t interested in... you know they were more resistant to working with a corporate client. They didn’t want to be... there was tension between them and working with a corporate client. They were more... they **didn’t think it was right to deliver a credit course and tailor it to a corporate client.**”...Interview D, Lines 35-46.

b) “The Continuing Education division itself was self-supporting, with no base budget from Ryerson as the parent institution. It also had no faculty of its own, and the responsibility for designing courses and awarding credits was retained by the individual faculties of the various schools. Because it was viewed as Ryerson’s entrepreneurial arm, Continuing Education was **free from much of the traditional university decision-making hierarchy and was able to respond quickly to new initiatives.**”...Document #3, p. 22.

A fourth pattern found in the analysis relates to the institutionalised nature of the industry associations involved with the case. The Retail Council of Canada (RCC) was more institutionalised than other industry associations because they were the central association representing the retail industry, with ties and access to retailers across Canada, as evident in the following descriptors from its website.

"Retail Council of Canada (RCC) has been the Voice of Retail in Canada since 1963. **We speak for an industry** that touches the daily lives of Canadians in every corner of the country... RCC is a not-for-profit, industry-funded association representing more than 43,000 store fronts of all retail formats across Canada, including department, specialty, discount, and independent stores, and online merchants."...<http://www.retailcouncil.org/aboutus/>

"RCC also **represents the needs of retailers** to politicians and government officials at all levels and advocates to support retail-friendly legislation in Canada"... <http://www.retailcouncil.org/memberservices/faqs.asp#doforme>

Finally, a fifth pattern is that the nature of the T. Eaton Co. Ltd.'s institutional state shifts during the degree development process. In 1994, The T. Eaton's Company was a highly centralised Canadian retailer with ties and access to other retailers and suppliers across Canada, and substantial control over their suppliers. A high level of centrality is evident if the embedded organisation has ties to, access to, and control over other actors in the field (Rowley, 1997). Individual organisations with centralised locations in a field have a legitimate right to speak because they are able to easily disseminate texts to a large number of other actors and have power to influence the field (Phillips et al., 2004; Mitchell et al., 1997). Eaton's centrality is evident in the following quotes from a) the Harvard University case study about the ESR process, and b) the interview with the Ryerson CE Director.

a) "Like the maple leaf and the Mounties, **Eaton's was a Canadian institution.**"...Document #83, p. 1.

b) "that was largely funded through suppliers to **Eaton's...they simply went to their various suppliers** and said "this is what we're putting in this process, what are you putting in"....Interview C, Lines 79-85.

However, Eaton's centrality shifts during the timeframe of the ESR case. By 1997, Eaton's legitimacy is lower, as evident in their absence from the collaborations formed that year and in the following quote from *The Eaton Legacy*.

"The T. Eaton Co. **files for bankruptcy protection** while struggling to restructure its retail operations and stem substantial financial losses."...Document #3, p. 11.

These individual organisations participated in multiple interorganisational collaborations and produced the discursive work that constituted the innovative degree development process. Characteristics of these collaborations are now discussed.

b) Characteristics of Interorganisational Collaborations: There are eleven interorganisational collaborations that produce discursive actions and that are formed at different times throughout the degree development process. Six are formed in 1994, one in 1995, three in 1996, and one in 1997.

There is a temporal pattern in the membership, whereby the degree development process originated with two individual organisations (Ryerson University and the ESR group at Eaton's) in 1993, and multiple interorganisational collaborations are then formed every year until 1997.

1994

There are five collaborations formed in 1994, which include multiple individual organisations and there are four patterns evident in the membership of these collaborations:

1) The Ryerson academic Faculties become involved in the degree development process, as illustrated in the following exemplar from *The Eaton Legacy*.

“the Senior Management Group was expanded to include the **deans of Business and Applied Arts**...reflecting the interdisciplinary nature of the overall process. The Curriculum Development Committee continued its work, assisted by **course development leaders appointed from Ryerson faculty** who were responsible for the individual courses in the program.”...Document #3, p. 28.

2) The federal government also becomes involved with the original ESR partnership in the Vision 2000 Committee, with the intent of coordinating and monitoring the development of the ESR, as mentioned in *The Eaton Legacy*.

“The Eaton School of Retailing Vision 2000 Committee was established by Eaton’s and the federal government to coordinate and monitor development. It included **representation from both Eaton’s and Ryerson, as well as the federal government**.”...Document #3, p. 25.

3) Eaton’s was included on the Curriculum Development Committee which was the first time an outside organisation had participated in the development of curriculum in Ryerson’s degree development process, as illustrated in the following quote from a newsletter and case study produced by the federal government for the distance education community.

“Eaton’s was asked to sit on the Ryerson curriculum development committee; **the first time an outside organization had this participation**.”...Document #23, p.32

4) The Continuing Education Retail and Services Sector Advisory Committee is formed and broader representation from the retail sector is included in the process, as shown in the following exemplar from *The Eaton Legacy*.

“The Continuing Education Retail and Services Sector Advisory Committee was formed to ensure the applicability of the School’s programming to the retail industry at large. As such, it **included members from other retailers**,

manufacturers and professional associations, as well as Eaton's and Ryerson."...Document #3, p. 26.

1995

In 1995, the Vision 2000 collaboration is succeeded by the Industrial Adjustment Services Initiative in Retail Management Education (IAS) and the expansion of the process to the broader retail environment continues. The membership list (Document#42) shows that the IAS expands on the Vision 2000 membership to include the Retail Council of Canada (RCC), other retail industry associations, embedded representatives of the broader corporate retail community and suppliers.

1996

There are three interorganisational collaborations formed in 1996 and there are three patterns in the purpose of these collaborations, which are illustrated with exemplars drawn from *The Eaton Legacy*:

1) The development of the programme is positioned as a national process. The Canadian Retail Management Education Program (CRMEP) was formed and, while it was situated within Ryerson's CE Faculty, it was also affiliated with the academic Faculties.

"With the involvement of the federal government and the need to become national in scope, the retail certificate programming at Ryerson **becomes known as the Canadian Retail Management Education Program (CRMEP)**, while the term ESR applies only internally at Eaton's."...Document #3, p. 10.
"Administration of the Program rested with the Continuing Education division, along with the faculties of Business and of Applied Arts."...Document #3, p. 27.

2) Curriculum is developed for a four-year degree in retail management and The Retail Management Degree Program Advisory Committee is formed for this purpose.

"Curriculum development for a **four-year degree in retail management begins with a Program Advisory Committee** being formed by Ryerson from members

of industry, other academic institutions and various levels of government, in accordance with Ryerson policy.”...Document #3, p. 10.

3) A retail-specific body of knowledge is constituted through the formation of the Eaton Chair in Retailing.

“The objective of the Chair is to strengthen the competitive position of the Canadian retail sector by increasing **its ability to understand and use emerging information technologies**.”...Document #3, p. 11.

1997

In 1997, the purpose of the IAS collaboration is assumed by the National Sector Adjustment Services (NSAS) Initiative, which is described in the following quote from *The Eaton Legacy*.

“The federal government agrees to **support the continuation of the work of the IAS Initiative** in the areas of professional certifications, the evaluation of distance education technologies, and career awareness and marketing. **As a result, the National Sector Adjustment Services (NSAS) Initiative is created**”...Document #3, p. 12.

In order to examine the particular nature of the discursive work performed by each of these collaborations, the analysis then classifies the characteristics of each of the interorganisational collaborations which produce texts. The following sections provide an analysis of the characteristics of the interorganisational collaborations, by focusing on the collaborations’ characteristics of collective identity and involvement and embeddedness.

5.3.1 Collective Identities of Collaborations:

The collaborations’ collective identities are analysed according to whether they represent a) *generalised* membership ties to retail management education issues and

b) *particularised* membership ties to other members in the interorganisational collaborations (Hardy et al., 2005).

a) Generalised identity ties are those that constitute organisations' membership in a collaboration through a shared connection with an issue (Hardy et al., 2005; Collins, 1981). This study measures a high level of generalised ties when organisations identify themselves with a relevant issue. In this case, the generalised issue evident throughout the data is that retail management is an important part of the Canadian economy and it is underserved by higher education as illustrated in the following quote from *The Eaton Legacy* about the membership of the IAS Initiative.

"The IAS Initiative recognized the retail industry as a major component of the Canadian economy. **Its main premise was the fact that there was a distinct lack of retail-specific education in Canada**; specifically, no university degree in retail was available."...Document #3, p. 40.

The multiple collaborations share high levels of generalised ties throughout the process which are tied to the need for retail management education. In addition, there are patterns in the ways that the collaborations are structured that exhibits their particularised ties.

b) Particularised identity ties are those which tie organisations together directly through a generalised issue (Hardy et al., 2005). A high level of particularised membership ties is evident when there is a structural basis for a collaboration to address the issue in a particular way. Evidence of highly particularised ties includes patterns of interdependence, authority, and roles as described below in this exemplar about the ESR roles from *A Whole New Way*.

"A collaborative, interdisciplinary management model for the program has emerged that involves several schools and departments within Ryerson along

with Eaton's as a corporate partner. The **roles and responsibilities of all participants are clearly defined.**"...Document #12, p. 27.

The IAS Initiative also shows evidence of highly particularised ties as shown in this quote from *The Eaton Legacy*.

"After the support of the federal government was secured, **a 27 member (IAS) sectoral committee and a 10-member steering committee were formed in November 1995. Five sub-committees were created from the sectoral committee** to pursue specific research projects and make recommendations"
...Document #3, p. 40

In addition, there is evidence that the collaborations create names and publish membership lists in order to portray their purposes and structures. For example, Document #42 is a membership list for the committee named the IAS Initiative for Retail Management Educational Programming.

There are patterns in the analysis about the nature of the collaborations' particularised ties. These patterns arise from the interactions between embedded, corporate members from the retail sector, which is a fragmented field, and from the public sector (i.e. government and university), which is unfragmented and highly institutionalised. For example, when the collaborations involve the federal government, it exerts pressure about the nature of the generalised issue (i.e. that it be oriented to the entire Canadian retail sector), as illustrated in the following quote from *The Eaton Legacy*.

"the involvement of federal and provincial government representatives in the project encouraged the (Vision 2000) management members to consider other possibilities of an industry-wide nature. This was largely due to the fact that the **federal government was reluctant to be seen as supporting one company or organization in particular, and instead was interested in the betterment of the entire sector.**"...Document #3, p. 85.

The federal government also exerts pressure about the a) interdependence between members, in which they had specific meeting and report requirements, b) their roles,

for which they had expertise requirements and c) the names of collaborations, which they required portray a national purpose. The following exemplars from *The Eaton Legacy* illustrate these pressures.

a) "In addition to **application requirements for federal funding, there were criteria to be met throughout the life of the various projects**...We had large committee meetings quarterly at which we discussed progress and submitted written reports, as well as numerous subcommittee meetings attended by federal government representatives, so they could comment and make suggestions."...Document #3, p. 90.

b) "However, **the nature and extent of industry involvement in the actual work of the committee were often a source of conflict** between the federal government representatives and the remainder of the committee members."...Document #3, p.90

c) "With the involvement of the federal government and the need to **become national in scope**, the retail certificate programming at Ryerson became known as the Canadian Retail Management Education Program (CRMEP), while the term ESR applies only internally at Eaton's."...Document #3, p. 10.

This pattern of requirements being made by institutionalised members is also evident in requirements made by Ryerson about the particularised membership ties of the Program Advisory and Curriculum Development Committees. This exemplar from *The Eaton Legacy* illustrates this pattern.

"There were certain **criteria required by the new Ryerson degree development policy as to membership of the Advisory Board**. For example, we had to have academics from other institutions, where normally an advisory board is made up of only people from industry."...Document #3, p. 75.

This analysis therefore shows patterns in the collective identities of the case's interorganisational collaborations. The generalised identity of these collaborations provides a common issue around which their discursive work converges. In addition, the patterns in their particularised identities provide the structure for the production of the discursive texts which constitute the degree development process. The nature of the degree of involvement and embeddedness evident in the collaborations also

influences their discursive work. A discussion of these characteristics is presented in the following section.

5.3.2. Involvement and Embeddedness of Collaborations

The second dimension of the interorganisational collaborations analysed is their degrees of *involvement* and *embeddedness* (Lawrence et al., 2002). Involvement is defined as the internal dynamics of a collaboration. This study measures a high level of involvement when there is discursive evidence of deep interaction amongst members, partnership arrangements, and bilateral information flows. For example, the original ESR agreement (Document #84) presents evidence of a highly involved collaboration based on a partnership agreement. The following descriptions show the deep interaction amongst members of the ESR collaboration from a) *The Eaton Legacy* and b) a Canadian Retail Management Education Program (CRMEP) brochure on the partnership.

a) "To facilitate the merging of the two cultures, academic and corporate, and to allow both parties equal representation in decision-making processes, **an open and integrative project management framework was developed** with the help of the federal government, one of the major funding organizations of the initiative. At the same time, Ryerson and Eaton's promised to trust each other's internal processes to better ensure the success of the overall process."...Document #3, p. 25.

b) "The partnership between Eaton's and Ryerson is characterized by a **high level of trust** which allows...

- The opening of the university inner sanctum to allow the corporate partner into the curriculum committee
- Highly-integrated strategies for program implementation and promotion."
...Document #24, p.3

Involvement patterns related to the interactions and information flows between the embedded corporate actors and institutionalised actors from the public sector members, are also evident. In particular, these collaborating organisations have

different approaches to decision-making. Instances occur throughout the process that bring the different approaches into focus and result in tensions between the need to maintain institutional (i.e. university and government) processes, whilst simultaneously creating new normative associations about how sector-specific degree development should proceed. The following exemplar from *The Eaton Legacy* illustrates these tensions between Ryerson (a highly institutionalised organisation) and Eaton's an embedded corporate actor.

"...problems in merging the two cultures. The university environment allows any decision to be re-opened at any time. We had to manage funding decisions that flow downward and product decisions that flow upward, and the two come from totally different sources. For example, product decisions come from individual faculty members. There are approval processes that go from the department level, to the school, to the faculty, to the university level and finally to the Board of Governors. All of these approval stages, with the exception of the last one, are peopled by producers. So, you have a process that permits a faculty member to exercise enough influence to introduce new ideas or to ensure that we continue to teach what we've always taught. And, there's no easy way of bringing the funding and the product levels together to bear on a decision, as compared to retailing, which is very line directive, highly centralized, and based on standard operating procedures. Retailing historically has been a totally different model – everything is driven top-down. (Eaton) asked **"Do your people always shovel fog?** It's very different! It's certainly not driven by any great need to push forward, they like to take their time and research very carefully what they're doing, whereas in business, if you're going to do something, then you go ahead and do it with as little fuss and muss as possible. At times, **the group from Eaton's was frustrated by the relatively slow and complex processes at Ryerson** which seemed to impede progress, and wondered whether the resistance had any real validity or if it were only resistance to change itself. However, they refrained from exerting any pressure which would short change Ryerson's academic processes." ...Document #3, p.29-30

Tensions in involvement patterns are also apparent from other constituents within the Ryerson community. For example, there is resistance to the process from representatives of the student community and from some faculty, as evident in these quotes from a) a Ryerson newspaper and b) *The Eaton Legacy*.

a) "The ethical question is this: are **universities sacrificing their academic freedom in exchange for private sector money?** The Canadian Federation

of Students (CFS), a national student organization, says the answer is yes. ...Direct corporate funding is definitely a bad thing. ...corporations might influence universities to adopt policies that are not in the best interests of students. ...a **sociology professor at Ryerson**, believes an increased corporate presence at Ryerson could turn into a negative development” ...Document #15, p.3

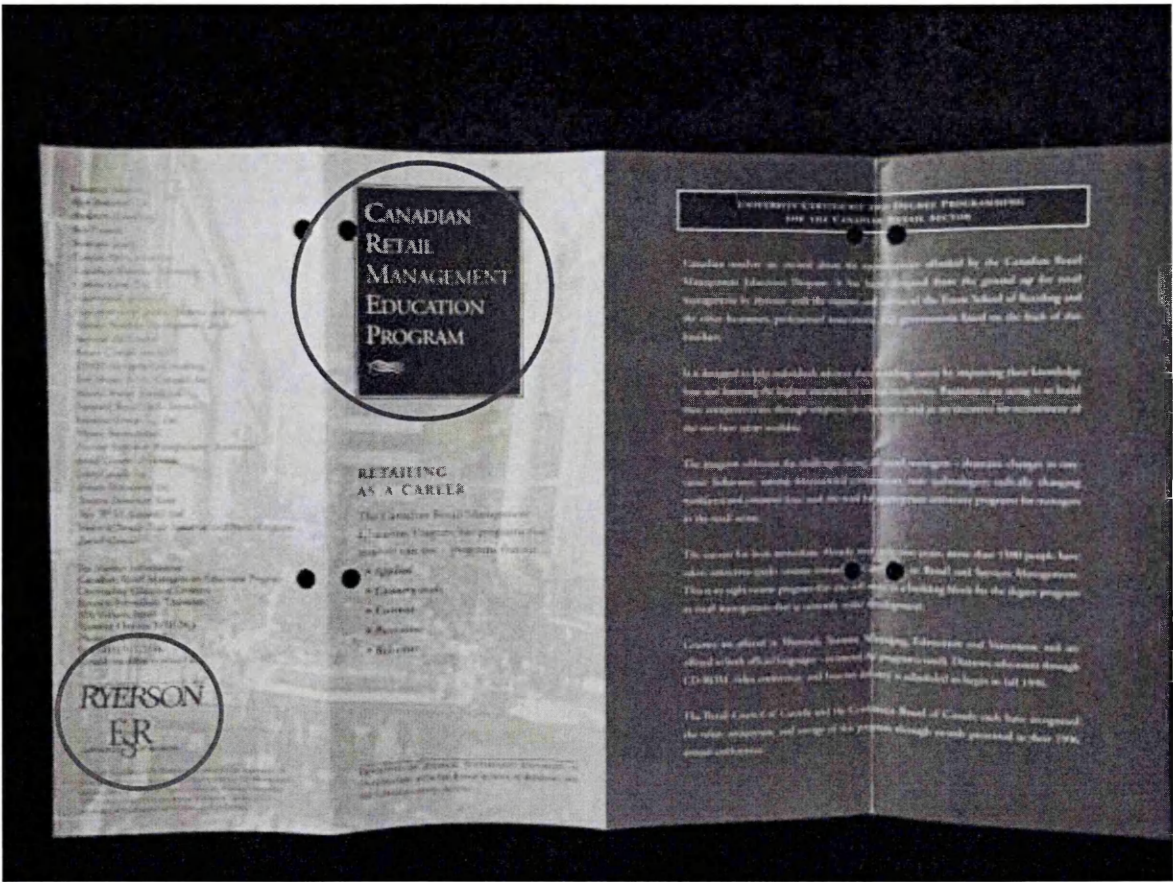
b) “With industry representatives actually sitting and voting on a committee designed to develop academic curriculum, **a few faculty thought the profit motive would take over from higher education’s pursuit of truth and learning for its own sake**. The challenge was to ensure that undue influence was not placed on the structure, content and delivery of the curriculum, and that the process was not “for sale”. It was equally essential to move beyond the view of curriculum as something untouchable by the outside world.” ...Document #3, p. 68

Tensions are also apparent between individual government actors (i.e. highly institutionalised) and embedded corporate actors which are evident in the following exemplar from *The Eaton Legacy* about the production of texts.

“If a proposal did not fulfil the government’s requirements completely, or left any information out, it risked being rejected...You have to convey your proposal to the government in a way that appeals to them...**They have their own mandates which you must match as closely as possible**.”...Document #3, p.86

Embeddedness is defined as the ways that collaborations are focused on interorganisational relationships (Lawrence et al., 20020). This study measures a high level of embeddedness as being evident when there are interactions with third parties, representation arrangements, and multidirectional information flows. An example of representation arrangements is how the ESR, CRMEP and Ryerson logos are all represented in programme materials. For example, the following picture of a CRMEP brochure titled *Retailing as a Career*, shows the Ryerson and ESR logos in the bottom left corner (see circled elements) and the Canadian Retail Management Education logo in the top middle (see circled element).

Picture 5.1 Document #32: CRMEP Overview



In addition, the ESR representatives co-presented at conferences, as illustrated in the presentation outline of A Model for Developing Intellectual Capital in Retailing (Document #31) which the ESR General Manager and Ryerson CE Director co-presented at a Corporate University conference. They were also engaged in the membership of the other interorganisational collaborations as illustrated in the membership list for the IAS Initiative (Document #42), thereby providing evidence of a high level of embeddedness in the ESR collaboration.

There is also evidence of high embeddedness in the IAS Committee, as illustrated in the following exemplar from *The Eaton Legacy*.

"Its (IAS sub-committee) members were asked to **promote the objectives within their own organizations**, and several were called upon to **give speeches and presentations** at events across North America."...Document #3, p. 45.

The NSAS Committee also shows evidence of high embeddedness because members represent the Committees with third party groups, as illustrated in these exemplars from a) the proposal for the creation of and b) a report from the NSAS Steering Committee.

a) "The Committee will establish **informational and working liaison with other similar successful sectoral initiatives**"...Document #50, p. 3.

b) "One of the roles of the NSAS Steering Committee members will be the **extension of their communications network among suppliers and retailers.**" ...Document #51, p. 17.

The analysis also presents a pattern of multidirectional information flow, which is related to succession over time between multiple collaborations, according to different purposes and membership requirements. When the purposes of collaborations change, the collaborations are succeeded by new ones with new names, members, and responsibilities. For example, in 1996, the ESR was renamed the CRMEP and was based out of Ryerson's CE Faculty, rather than out of Eaton's, as shown in this quote from the CRMEP's brochure about the partnership.

"As the project evolved, the ESR became a corporate structure within Eaton's with the responsibility of managing the partnership with Ryerson. The two core certificates, Retail and Services management I and II, together **became known as the Canadian Retail Management Education Program** and resided in Ryerson's Continuing Education division, along with the faculties of Business and of Applied Arts." ...Document #24, p. 4.

Another example is how the Eaton School of Retail Vision 2000 Committee evolved into the IAS Committee in 1995 which was succeeded by the NSAS Committee in 1997, as described in this exemplar from *The Eaton Legacy*.

“The Eaton School of Retailing Vision 2000 Committee was established by Eaton’s and the federal government to coordinate and monitor development. All dimensions of the project reported regularly to this committee, which met monthly. It included representation from both Eaton’s and Ryerson, as well as the federal government. **This committee was succeeded by two other government-funded steering committees – the IAS and NSAS initiatives.**”...Document #3, p. 25.

In summary, the actors involved with the development of the Canadian retail management degree include multiple individual organisational actors and interorganisational collaborations. The individual actors exhibit varying degrees of institutionalisation which are related to particular characteristics. The highly institutionalised government actors have formal authority related to sectoral degree development. As a university with a tradition of applied programmes, Ryerson is less institutionalised than the other universities involved with the degree development process and the Ryerson CE Faculty is less institutionalised than the Ryerson academic Faculties. In addition, as the recognised, national retail association, the RCC is more institutionalised than other participating associations. Finally, Eaton’s begins the degree development process as a highly centralised embedded actor in the Canadian retail management education field. However, its status as the taken-for-granted dominant department store retailer in Canada shifts as its financial viability declines to the point of bankruptcy by 1999.

Patterns in the nature of the interorganisational collaborations show high levels of engagement with common identities, involvement, and embeddedness. The

collaborations are also characterised by tensions between institutionalised and corporate members' norms of decision-making and development processes.

The analysis then examines the discursive actions performed by these actors during the development process. A discussion of these discursive actions is presented in the following section.

5.4 Analysis of Patterns in Discursive Institutional Work (DIW)

This section presents the analysis of the discourses produced and distributed by the actors in the ESR case. The analysis identifies the types of specific institutional work (IW) actions the actors perform and how these IW actions legitimise the process.

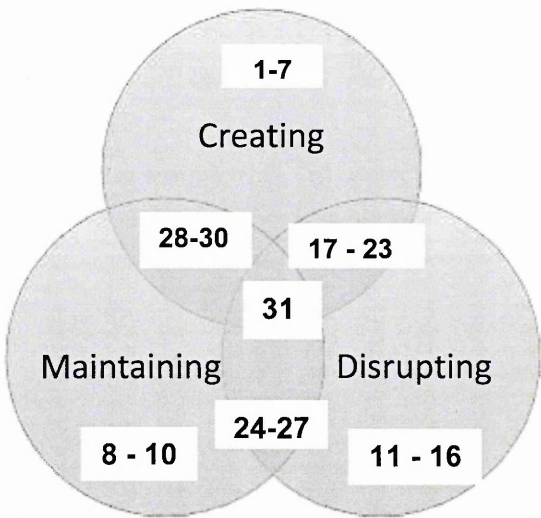
This analysis then focuses on how the interplay of the identified discursive themes perform particular discursive work. Finally, the patterns in the types of texts produced and distributed throughout the process are analysed.

5.4.1 Patterns in Discursive IW Actions

Institutional work (IW) actions are defined as actions that generate texts and that are generated by actors in the ESR case. The analysis of the IW actions begins by classifying discursive themes which are evident throughout the process. The individual themes are then numbered and categorised according to the type of IW action they perform. The IW actions are derived from Lawrence and Suddaby's (2006) model (see Section 2.8) and the codes developed in Table 2.1 are used to denote each IW action. Some of the themes converge with others throughout the degree development process and these convergent themes are also numbered and coded.

For example, discursive theme #2 (Table 5.3) is “*The development of a Canadian retail management degree program includes a definition of the requirements for the constituent certificates, occupational standards and degree.*” This discursive theme performs a ‘Creating’ form of IW. It is oriented to **Defining** rule systems, and the code for that form of IW is **C:D**. Figure 5.1 shows how all of the discursive themes constitute the Creating (i.e. C:...), Maintaining (i.e. M:...) and Disrupting (i.e. D:...) types of discursive IW actions. Figure 5.1 also shows how IW actions performed in discursive themes converge. These convergent themes are portrayed in the diagram as overlaps between the three main types of IW actions.

Figure 5.1: Institutional Work (IW) Discursive Themes



Occurrences of the IW discursive themes are then counted and charted. Table 5.3 presents a chart of the discursive themes which are organised by the type of IW action they perform. The themes are numbered and these numbers are used to identify the themes in Figure 5.1 and throughout the analysis. When the themes converge, the resulting Converging discursive theme is also identified, coded and numbered.

Table 5.3 Institutional Work Categories and Related Discursive Themes

#		Institutional Work Categories and Related Discursive Themes	
		Creating	
1	C:A = Creating: Advocacy The development of a Canadian retail management degree program includes advocacy and resources of interorganisational collaborations.		
2	C:D = Creating: Defining The development of a Canadian retail management degree program includes a definition of the requirements for the constituent certificates, occupational standards and degree.		
3	C:V = Creating: Vesting The development of a Canadian retail management degree program includes funding by government.		
4	C:E = Creating: Educating The professionalisation of retail management as a career includes educating the public.		
5	C:CNN = Creating: Constructing Normative Networks The development of a Canadian retail management degree program includes interorganisational collaboration and support		
6	C:CNA = Creating: Changing Normative Associations The development of a Canadian retail management degree program includes a nationally accessible, sector-based degree.		
7	C:CI = Creating: Constructing Identities Retail management education (RME) makes retail management an attractive and professional career		
		Maintaining	
8	M:Ea = Maintaining: Enabling University degree curriculum and requirements should be developed by academic faculty and not include corporations.		
9	M:VDT0 = Maintaining: Valorizing/Demonizing – Threat Canadian retailing needs RME to maintain its competitiveness in face of challenges from American competition and other external changes		
10	M:Eb = Maintaining: Enabling Eaton's will maintain its position in the retail industry through a retail management degree program.		
		Disrupting	
11	D:DMFa = Disrupting: Disassociating Moral Foundations Retail management is an important part of the Canadian economy and it is underserved by higher education.		
12	D:DMFb = Disrupting: Disassociating Moral Foundations US and UK provide better RME and better educated retail managers than Canada.		
13	D:DMFc = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program includes an innovative university program development process.		
14	D:DMFd = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program should include a knowledge base that is co-produced with industry		
15	D:DMFe = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program includes a focus on competencies, including occupational skills standards.		

#	Institutional Work Categories and Related Discursive Themes	
16	D:DMFf = Disrupting: Disassociating Moral Foundations Retail management is not viewed as a career; it is viewed as unattractive, unprofessional and an Accidental Career.	Disrupting + Creating
17 = 11 + 6	D:DMFa = Disrupting: Disassociating Moral Foundations Retail management is an important part of the Canadian economy and it is underserved by higher education. + C:CNA = Creating: Changing Normative Associations The development of a Canadian retail management degree program includes a nationally accessible, sector-based degree.	Converging Discourse
18 = 14 + 5	The disruption of the dearth of RME is countered by the development of a nationally accessible, retail management degree program. D:DMFd = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program should include a knowledge base that is co-produced with industry + C:CNN = Creating: Constructing Normative Networks The development of a Canadian retail management degree program includes interorganisational collaboration and support.	Converging Discourse
19 = 16 + 7	The development of a Canadian retail management degree program should include a knowledge base co-produced by industry involving interorganisational collaboration and support. D:DMFf = Disrupting: Disassociating Moral Foundations Retail management is not viewed as a career; it is viewed as unattractive, unprofessional and as an Accidental Career + C:CI = Creating: Constructing Identity Retail management education makes retail management an attractive and professional career.	Converging Discourse
20 = 13 + 5 + any of: 14, 6, 8	Retail management is a legitimate career and a retail management degree professionalises it as a career. D:DMFc = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program includes an innovative university program development process + C:CNN = Creating: Constructing Normative Networks The development of a Canadian retail management degree program includes interorganisational collaboration and support. + any of: D:DMFd = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program should include a knowledge base that is co-produced with industry C:CNAa = Creating: Changing Normative Associations The development of a Canadian retail management degree program includes a nationally accessible, sector-based degree. M:Ea = Maintaining: Enabling	

#	Institutional Work Categories and Related Discursive Themes
	University degree curriculum and requirements should be developed by academic faculty and not include corporations
	<p style="text-align: center;">Converging Discourse</p> <p>The innovative development process includes interorganisational collaboration and support and any of:</p> <ul style="list-style-type: none"> • a knowledge base that is co-produced with industry • a nationally accessible, sector-based degree • countering the traditional university process
21 = 4 + 16	<p>C:E = Creating: Educating The professionalisation of retail management as a career includes educating the public.</p> <p>+</p> <p>D:DMFF = Disrupting: Disassociating Moral Foundations Retail management is not viewed as a career; it is viewed as unattractive, unprofessional and an Accidental Career.</p>
22 = 2 + 15	<p style="text-align: center;">Converging Discourse</p> <p>Because retail management has a poor career image, the public needs education about how attractive and professional it is.</p> <p>C:D = Creating: Defining The development of a Canadian retail management degree program includes a definition of requirements for the constituent certificates, occupational standards and degree.</p> <p>+</p> <p>D:DMFe = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program includes a focus on competencies, including occupational skills standards.</p>
23 = 1 + 13	<p style="text-align: center;">Converging Discourse</p> <p>The definition of requirements for occupational standards and the retail management degree program provides a focus on competencies and skills standards.</p> <p>C:A = Creating: Advocacy The development of a Canadian retail management degree program includes advocacy and resources from interorganisational collaborations.</p> <p>+</p> <p>D:DMFc = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program includes an innovative university program development process.</p>
	<p style="text-align: center;">Converging Discourse</p> <p>The advocacy of interorganisational collaborations represents an innovative university program development process.</p>
24 = 11 + 9	<p style="text-align: center;">Maintaining + Disrupting</p> <p>D:DMFa = Disrupting: Disassociating Moral Foundations Retail management is an important part of the Canadian economy and it is underserved by higher education.</p> <p>+</p> <p>M:VDT0 = Maintaining: Valorizing/Demonizing – Threat/Opportunity</p>

#	Institutional Work Categories and Related Discursive Themes	
	Canadian retailing needs RME to maintain its competitiveness with challenges from American competition and other external changes.	Converging Discourse
25 = 8 + 13	A Canadian retail management degree program will disrupt the dearth of RME, thereby maintaining Canadian retailing competitiveness M:Ea = Maintaining: Enabling University education should be developed by academic faculty + D:DMFc = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program includes an innovative university program development process	Converging Discourse
26 = 8 + 14	The innovative retail management program development process counters the maintenance of the traditional university process. M:Ea = Maintaining: Enabling University education should be developed by academic faculty + D:DMFd = Disrupting: Disassociating Moral Foundations The development of a Canadian retail management degree program should include a knowledge base that is co-produced with industry.	Converging Discourse
27 = 12 + 9	The need for a knowledge base that is co-produced with industry counters the maintenance of the traditional university process. D:DMFb = Disrupting: Disassociating Moral Foundations US and UK provide better retail management education and better educated retail managers than Canada. + M:VDT0 = Maintaining: Valorizing/Demonizing – Threats/Opportunities Canadian retailing needs retail management education to maintain its competitiveness in face of threats from American competition and other external changes.	Converging Discourse
	Canadian RME will disrupt prevalence of US and UK retail managers, thereby maintaining Canadian retailing competitiveness	Maintaining + Creating
28 = 8 + 5	M:Ea = Maintaining: Enabling University education should be developed by academic faculty. + C:CNN = Creating: Constructing Normative Networks The development of a Canadian retail management degree program includes interorganisational collaboration and support	Converging Discourse
29 = 9 + 6	Maintenance of the sanctity of university curriculum is countered by the contribution of interorganisational collaboration and support. M:VDT0 = Maintaining: Valorizing/Demonizing – Threats/Opportunities Canadian retailing needs RME to maintain its competitiveness in face of challenges from American competition and other external changes.	

Institutional Work Categories and Related Discursive Themes	
#	+
	<p>C:CNA = Creating: Changing Normative Associations The development of a Canadian retail management degree program includes a nationally accessible, sector-based degree.</p> <p>Converging Discourse</p> <p>Canadian retailing needs a nationally accessible, sector-based degree to maintain its competitiveness.</p> <p>C:A = Creating: Advocacy The development of a Canadian retail management degree program includes advocacy and resources from interorganisational collaborations.</p> <p>+ M:VDT0 = Maintaining: Enabling – Threats/Opportunities Canadian retailing needs RME to maintain its competitiveness in face of challenges from American competition and other external changes</p> <p>Converging Discourse</p> <p>Advocacy by interorganisational collaborations will promote retail management education and maintain the competitiveness of Canadian retailing.</p> <p>Creating + Maintaining + Disrupting</p>
30 = 1 + 9	<p>D:DMFa = Disrupting: Disassociating Moral Foundations Retail management is an important part of the Canadian economy and it is underserved by higher education.</p> <p>+ M:VDT0 = Maintaining: Valorizing/Demonizing – Threats/Opportunities Canadian retailing needs retail management education to maintain its competitiveness in face of challenges from American competition and other external changes.</p> <p>+ C:CI = Creating: Constructing Identity Retail management education makes retail management a more attractive and professional career</p> <p>Converging Discourse</p> <p>The Canadian retail industry is important, but underserved by higher education, so it needs retail management education to maintain its competitiveness, by professionalising retail management as a career.</p>

Table 5.3 shows patterns in the types of discursive IW actions performed throughout the process and in the ways that they converge to produce convergent themes. The table shows that there are seven discursive themes that perform different types of Creating IW including Advocating (C:A), Defining (C:D), Vesting (C:V), Educating (C:E), Constructing Normative Networks (C:CNN), Changing Normative Associations (C:CNA), and Constructing Identities (C:CI) actions. Table 5.3 also identifies three discursive themes that perform Maintaining IW through Enabling (M:E) and Demonising (M:VDTO) actions. There are also six discursive themes that perform Disrupting IW and all of them focus on Disassociating Moral Foundations (D:DMF).

As illustrated in Figure 5.1 and described in Table 5.3, there are convergences of Disrupting and Creating, Maintaining and Disrupting, Maintaining and Creating, and of all three categories. The constituent themes in each of the convergent themes are distinct and recognisable. For example, the following exemplar from the IAS Initiative report shows evidence of three different IW themes which converge to produce convergent discursive theme #31.

“Canada’s Retail Sector accounts for 30% of GNP and associated jobs, and 10% of property taxes. Retailing faces many challenges, including intensified global competition, new technologies, rapidly changing consumer behavior (**Discursive Theme #9, M:VDTO**). In spite of its size and importance, retail is ignored by higher education (**Discursive Theme #11, D;DMFa**):

- Parents and school personnel do not encourage youth to enter retailing as a career
- Canadian business schools typically offer only one or two introductory retail related courses, if any. US schools are only a little more responsive.
- Within the available programming, there is little provision to serve the learning needs of retail employees.

...The T. Eaton Company created the Eaton School of Retailing (ESR) which was designed to make retail an attractive, professional career option.”

(**Discursive Theme #7, C:CI**)...Document #31, p.1

After the IW discursive themes are categorised, the documentation is organised over time (see Appendix B, Table 4.2) and is searched for evidence of their occurrence. The occurrence of each of the discursive themes is then counted and presented in Table 5.4.

Table 5.4 IW Actions: Discursive Themes over Time

Stages	Inception n=13		Formation n=76			Instantiation n=14	
IW # (Table 5.3)	1993 n=1	1994 n=12	1995 n=19	1996 n=30	1997 n=27	1998 n=6	1999 n=8
Creating							
1			3		1		
2					2	1	1
3							1
4					2		
5	1		1		1		
6		1	1	2	3	1	1
7			1				
Maintaining							
8			1				
9		1					
10		1		1			
Disrupting							
11			3	5			
12				2			
13						1	
14				1	1		1
15					1		
16				1			
Disrupting and Creating							
17					2		
18			1		1		
19						1	1
20		1	4	1	2	1	
21				1			
22							1
23			1	2	2		
Maintaining and Disrupting							
24		8		2	1		
25				2			
26							1
27					1		
Maintaining and Creating							
28			1	2		1	
29			1	1	2		
30			1				
Creating and Maintaining and Disrupting							
31				6	5		1

Table 5.4 illustrates that there are temporal patterns in the occurrence of the IW themes. These patterns characterise three phases in the types of IW actions performed during the development process.

Phase 1- Inception (1993 and 1994): During this Phase, 61% (8/13) of the IW actions are constituted by discursive theme #24. This theme converges maintaining work with disrupting work. This theme declares the viability of the Canadian retail sector through retail management education in face of threats from US/global retailers while disrupting the prevailing notion that the retail sector does not warrant specific retail management education programmes. This inception phase also shows evidence of the discursive theme maintaining retail management education's role in countering US threats (IW theme #9) and in maintaining Eaton's viability (IW theme #10). This evidence thereby establishes that the retail management education field is formed to counter identified threats. In addition, evidence of IW discursive actions oriented to producing innovative actions are evident for the first time. For example, the development of a national, retail sector-based degree (IW theme # 6) and the related interorganisational collaboration (IW theme #5) are first introduced.

Phase 2: Formation (1995 to 1997): This second phase shows discursive evidence of the mobilising resources that the actors utilise in the process. In particular, this is the only phase where there is evidence of Advocating work (IW theme #1). There is also evidence of Educating IW actions (IW theme #4), which are not evident anywhere else. The discursive theme maintaining faculty's exclusive role in degree development (theme #8) is only evident in 1995. However, when this theme is converged with disrupting and creating themes (i.e. in Themes #, 20, 25, and 28), it

appears throughout this Phase. These convergent themes provide discursive support for disrupting faculty's exclusive role and for creating innovative processes. In addition, the theme that shows convergence of all three types of IW actions (IW theme #31) is evident for the first time, and it discursively establishes the generalised issue central to the interorganisational collaborations created in this Phase.

Phase 3: Instantiation (1998 and 1999): This Phase is when there is evidence of multiple IW discursive actions taking place. Over a third of the actions provide Defining (C:D) of programme requirements and Vesting (C:V) of funding discursive themes. For the first time, a convergent discursive theme (IW theme #19) linking the professionalising impact of specific retail management education to retail management's negative career image is evident.

The IW discursive themes constitute institutionalising actions in multiple forms, including converging forms. These multiple actions are evident in three distinct phases and present multiple legitimating strategies throughout the degree development process. The next section discusses these legitimisation strategies.

5.4.2 Patterns in Discursive IW Legitimation Strategies

The IW discursive themes use multiple legitimating strategies. These strategies are classified according to the dimensions in Van Leeuwen's (2007) model and the following analysis presents patterns in the discursive legitimating strategies used throughout the degree development process. The IW discursive themes utilise multiple a) authorisation, b) rationalisation and c) moral evaluation legitimisation strategies.

a) *Authorisation Legitimation Strategies*: The analysis shows that there is evidence of legitimation provided by authorisation strategies that refer to the authority of tradition, role models and authoritative actors, both impersonal and personal.

- *Tradition*: Full-time university faculty draw upon traditional authoritative legitimation provided by the degree development process that had always been in place and that did not include corporate input, as illustrated in discursive theme #8 “*University degree curriculum and requirements should be developed by academic faculty and not include corporations.*” This theme is an example of Maintaining:Enabling (M:E) IW and it is evident in the following exemplar from *The Eaton Legacy*:

“The creation of the pilot course did not go unnoticed by Ryerson faculty in the School of Business. There were **concerns over academic integrity and control, with several faculty** suggesting that the residential intensive format was more typical of an executive development seminar and did not have the academic rigour deserving of university credit. While they would have preferred the pilot to be a non-credit-bearing prototype, they agreed to a credit course on the condition that the Associate Dean of Business be in charge of quality control by ensuring instructors met business-school standards, reviewing course materials, and insisting that students be formally evaluated and demonstrate proficiency in the course material. The issue of student evaluation was another flash point. Several business faculty demanded that participants take a three-hour closed-book exam to test their knowledge of the required pre-reading, threatening not to award credit unless the test were administered. ...did they really want industry input? In some circles in the university system, they did not, and there was a feeling **that the university was the fountain of all knowledge** and knew what was good for you...My expression is we had blood on the floor. Although this process had strong support from faculty, at almost every one of the points in the process we had resistance from some who believed that Eaton’s should have gone to them and not to Continuing Education, or who **genuinely believed that corporations had no place in higher education.**”
...Document #3, pp. 28-30

- *Role Model*: Eaton’s presents authoritative legitimation in discourses by asserting that they are a role model for the rest of the industry and by drawing on their 125-year history as a leading Canadian retailer. In addition, the

programme serves as a role model for others. Descriptions include how the programme is “the first” and “unique”. For example, the role model legitimisation description is presented in the title of the Ryerson book about the process, *“A Whole New Way: The Remaking of how to do University Education”* (Document #12) and in the title of the Retail Council of Canada conference presentation *“A Model for Developing Intellectual Capital in Retailing”* (Document #31).

- *Impersonal:* Impersonal legitimisation is provided by the government’s funding of the programme development and the related requirements and programme sanctioning. Likewise, the course and procedural requirements of the degree, which provide its regulative underpinnings, also provide impersonal authoritative legitimisation. For example, the funding is summarised in Table 5.9 . The legitimisation is illustrated in discursive themes #1 *“The development of a Canadian retail management degree program includes advocacy and resources of interorganisational collaborations”* and #3 *“The development of a Canadian retail management degree program includes funding by government”* which are evident in the following exemplar from the interview with the CE Director.

“Through the course of the approximately five years that this project was in process, we were able to flow something just over \$14 million into the development and delivery of programming. That **included contributions from every provincial government across the country as well as the federal government**, both CIC and HRSDC at the time.”...Interview C, Lines 72-76

- *Personal:* In addition to the authoritative strategies used in discursive themes related to impersonal organisational actors (i.e. the governments), there is also evidence of legitimisation strategies oriented to specific people’s stature or

roles. In particular, they are related to discursive theme #1 (Table 5.4) "*The development of a Canadian retail management degree program includes advocacy and resources of interorganisational collaborations*" and are evident in this exemplar from a presentation at an RCC conference about the Ryerson President and the Eaton's CEO:

"Involvement and support at the very highest level. For both partners, the CEOs are personally involved and committed to the product and the goal."...Document #31, p.1

In addition, the personal authorisation of the Ryerson president for the corporate-university collaborations is evident in this quote from an internal Ryerson newspaper.

"...RPU's president, sees increased corporate partnerships not only as necessary, but beneficial to the university. "It is a very positive concept, especially at a polytechnic university. It increases the relevance of the student's learning and helps to enhance his or her ability to perform well in a career."...Document 15, p.3

Whereas authoritative strategies refer to how authority provides discursive legitimisation, rationalisation strategies refer to how actions' usefulness provides discursive legitimisation.

b) Rationalisation Legitimation Strategies: The analysis shows that there is evidence of legitimisation provided by rationalisation strategies that refer to the utility of actions. In particular, these strategies refer to how useful the actions are (i.e. instrumental strategies) and how the actions are aligned with a natural order (i.e. theoretical strategies).

- *Instrumental:* Multiple discursive themes claim that the development of a retail management degree programme will be a means to and have effects upon

improving retail management as a career in Canada, as evident in IW

Discursive theme #19 *"Retail management is a legitimate career and a retail management degree professionalises it as a career."* and as illustrated in the following quote from the interview with the current Director of the retail management degree.

"I think the legitimacy comes out of saying that one will benefit from or one's career will be enhanced by having postsecondary education and that the demands or the expectations or the requirements of the job will in fact need those skills sets, that level of thinking, critical thinking, etc. level of knowledge that will come with what you get out of a four year postsecondary education."
...Interview F, Lines 215-222

In addition, discursive theme #6 *"The development of a Canadian retail management degree program includes a nationally accessible, sector-based degree."*, presents an instrumental rationalisation by describing a collaborative, Canada-wide, technologically delivered programme available in a range of scheduling formats, which therefore would mobilise the national retail industry. This exemplar from the *Report on the Industrial Adjustment Services Initiative in Retail Management Education* illustrates this strategy.

"This education must be available Canada wide and I positively endorse the ESR, Bell Canada and Ryerson's endeavours to establish a distant learning network. To be able to offer this, using web-based technology where courses can be delivered to anyone, anywhere and anytime, is indeed a major step forward for Canadian industry."...Document #47, Endorsement letters.

Finally, discursive theme #28 (*"Maintenance of the sanctity of university curriculum is countered by the contribution of interorganisational collaboration and support."*) presents instrumental rationalisation for the maintaining and creating IW done in degree development, by stating that interorganisational collaboration is useful for curriculum development. The *Proposal for Creation*

of a Retail Sector Initiatives Fund Curriculum Committee shows evidence of this legitimization strategy in this quote.

“The expertise and experience developed within the retail sector must be consolidated, and **this body of knowledge transferred into an academic context**. A coherent plan of study must be created, incorporating both the industry-specific knowledge generated by the retail sector, and the pertinent theories and concepts developed by the more traditional university disciplines.”...Document #53, p.2.

Patterns of theoretical rationalisation also provide discursive legitimization for the degree development process.

- *Theoretical* – A significant legitimating characteristic of the discursive themes is the theoretical rationalisation about the need for retail management education. Discursive theme #11 “*Retail management is an important part of the Canadian economy and it is underserved by higher education*” theorises the need for a retail management degree programme by explaining that the industry’s significance represents an economic and social need for higher education. The following quote from a RCC presentation titled *A Model for Developing Intellectual Capital in Retailing*, illustrates this strategy.

“Canada’s Retail Sector accounts for 30% of GNP and associated jobs, and 10% of property taxes. Retailing faces many challenges, including intensified global competition, new technologies, rapidly changing consumer behavior. **In spite of its size and importance, retail is ignored by higher education**” ...Document #31, p. 1

Another theoretical rationalisation is made to legitimate the reasons for degree development collaborations that include industry in co-developing the knowledge base. Discursive theme #14 (“*The development of a Canadian retail management degree program should include a knowledge base that is co-produced with industry*”) is an example of this legitimization strategy as evident in this quote from a *Retailing as a Career Newsletter*, produced by the CRMEP.

"In order to develop the course content for Canada's first bachelor's degree in retail management, **it was essential that retailers themselves played an active part in the curriculum development process** – usually reserved for university faculty only."...Document #30, p.3

c) *Moral Evaluation*: The analysis shows that there is also evidence of legitimization being provided by moral evaluative strategies that use abstraction and moral evaluations to communicate moral values.

- *Abstraction* – Multiple discursive themes draw upon the abstract notion of Canadian nationalism as legitimating retail management education's role in maintaining the Canadian retail sector. Discursive theme #12 "*US and UK provide better retail management education and better educated retail managers than Canada*" compares Canada's retail education programming with North American and UK jurisdictions and draws upon a nationalistic moral imperative. The following discursive exemplar is drawn from a presentation made to the IAS Committee about *The Structure of Demand and Societal Need for Retail Education with an Emphasis on Ontario*.

"It is very clear that **Canada and Ontario lag behind the US, the UK and other countries** in retail training and education, as well as in professionalization." ...Document #41, p. 10

Another abstraction is found in discursive theme #11 "*Retail management is an important part of the Canadian economy and it is underserved by higher education.*" This theme communicates the moral value that because retail management is an important part of the economy it should not be associated with a lack of higher education. The Overview of the CRMEP provides the following discursive exemplar of this legitimating strategy.

"In spite of its size and importance, retail is ignored by higher education:

- Parents and school personnel do not encourage youth to enter retailing as a career

- Canadian business schools typically offer only one or two introductory retail related courses, if any. US schools are only a little more responsive. Within the available programming, there is little provision to serve the learning needs of retail employees...Document #31, p.1

Abstractions also occur referring to the collaborative degree development process. These abstractions perform Disrupting work that challenges the underlying moral foundation of a traditional university degree development process by asserting that this programme needs to be an innovative process that develops content with industry input. This disrupting work establishes the abstracted moral evaluative legitimacy of the collaborative degree development process, which is exemplified in this quote from *The Eaton Legacy*.

"The **knowledge base was in the retail industry, not in academia**. To tap that knowledge base, we had to develop a close relationship with industry people." ...Document #3, p. 24.

- *Moral Evaluation:* Moral evaluation also occurs in the negative evaluation of retail management's poor career image (Discourse #16 "*Retail management is not viewed as a career; it is viewed as unattractive, unprofessional and an Accidental Career*"). This theme evokes an evaluative stance about the prospects for retail management, thereby legitimating that this is a moral value that needs to be changed. This value is evident in this quote from an article in a trade publication.

"Employment in the retail sector is **not high on the list of desirable occupations**. In the perception of a large part of the general public, retail jobs are notoriously low paying, and retail employees either do not have education or skills to do anything else, or are filling in time until something better comes along."...Document #79, p.30

These legitimization strategies are evident throughout the IW discursive themes, and as a result, the use of legitimization strategies show the same temporal patterns as the IW discursive actions. The first Phase is dominated by a convergence of moral

evaluation and rational legitimization. The second Phase features all of the legitimating strategies and the third Phase shows more authorisation and rationalisation legitimating strategies than the earlier phases.

In addition, there is a pattern in the nature of the text producers that provides discursive legitimization in the forms of endorsements for this higher education process. Discursive endorsement by other institutionalised organisations (i.e. government, universities, accrediting bodies, sectoral associations) is important for degree development processes to advance, because their approval is often a requirement for progressing. Endorsements were provided by the following institutions.

- *Governments:* The federal government discursively endorsed the development of distance education delivery mechanisms through funding approvals in response to proposals and reports. The provincial government endorsed the degree programme, providing funding for full-time student enrolments. Endorsement by these state actors (i.e. governments) was often enabled or was contingent upon inviting the private sector to match funding (as was the case with the Eaton Chair, and the Eaton School of Retailing), and served as an incentive for the formation of interorganisational collaborations.
- *Canadian Universities:* The Canadian higher education community endorsed and legitimated the degree development through articles in their internal newsletters and participation in interorganisational collaborations. In Canada, higher education falls within the provincial government's jurisdiction; however, the Association of Universities and Colleges in Canada (AUCC) is a membership association for all Canadian, publicly funded, higher education institutions.

Because members regularly interact in ways that facilitate student mobility across Canada, their discursive endorsement legitimated the value of the degree and its constituent courses.

- *Accrediting Bodies:* Accrediting bodies provided legitimation by producing articles in their internal newsletters and by participating in the collaborations. For example, the AACSB provides accreditation for international business schools and the Human Resources Professional Association (HRPA) provides accreditation for human resource professionals.
- *Associations:* Associations (i.e. RCC, Grocery Council, and Conference Board of Canada) include educational issues in their purview, and they endorsed the process through participation in interorganisational collaborations, communications to members, and awards.

In summary, the analysis of the IW actions evident in the data shows multiple patterns in the nature of the discursive themes that constitute IW actions and in the legitimation strategies they present. Not only do the themes exhibit multiple forms of IW, they present multiple convergent forms of IW. There are also temporal patterns in the IW actions, resulting in three distinct phases of IW process – Inception from 1993 to 1994, Formation from 1995 to 1997, and Instantiation from 1998 to 1999. The IW actions constitute multiple legitimation strategies that are evident throughout the process. These strategies also show temporal patterns in the three phases.

This analysis of the IW actions is followed by the examination of patterns in the interactions of the discursive themes, which have been identified in this section. The

interactions are heretofore referred to as Discursive Work and are discussed in the following section.

5.5 Analysis of Patterns in Discursive Work

Inspired by Phillips et al. (2004), this study asserts that certain dimensions of discourses are more likely to produce institutions than others, including:

- a) their internal coherence and structure,
- b) the support they receive from broader discourses, and
- c) the challenges they encounter from competing discourses.

The analysis therefore utilises these dimensions to discern patterns amongst the IW discursive themes identified in Table 5.4, and the patterns are now discussed.

a) Patterns in Internal Coherence and Structure of Discursive Themes: The discursive themes are analysed for internal coherence and structure. Coherence of the themes is analysed according to how the constituting texts converge in descriptions and explanations. In particular, the themes are analysed according to how they draw on one another in established and understandable ways. The analysis shows evidence that constituting texts are explicitly iterative and cross-reference each other. For example, Document #47, *The Report of the Industrial Adjustment Services (IAS) Initiative in Retail Management Education* cites the following ten constituting texts.

- *The Structure of Demand and Societal Need for Retail Education, with an Emphasis on Ontario* (Document #4)
- *Analysis of Educational Needs Assessment of Retail Professionals* (Document #6)
- *Retail Management Education: A Review of Current Undergraduate Programs* (Document #5)
- *Proposal to Department/School Councils for an Undergraduate Degree in Retail Management* (Document #48)

- *The Alliance of Ryerson Polytechnic University, Eaton School of Retailing and Bell Canada: A Business Plan for Distance and Technology Enhanced Education Prepared by the Alliance* (Document #55)
- *Getting the Most Out of Learning – A Qualitative Evaluation of the Eaton School of Retailing* (Document #44)
- *Retailing as a Career – ESR Newsletters* (Documents #27-30)

This example illustrates how texts and their constituent discursive themes are internally coherent, thereby providing support for the notion that they are likely to produce institutions. The analysis also shows evidence of support for the themes from broader discourses.

b) Patterns in Support from Broader Discourses: Discourses that are supported by broader discourses and are not highly contested by competing discourses are more likely to produce institutions than discourses that are not (Phillips et al., 2004).

Broader discourses which support the ESR discursive themes are identified through a review including:

- academic literature;
- government websites;
- College and University websites;
- University reports;
- Professional Association websites;
- Professional Association reports.

Broader discourses that support the discursive themes in this analysis are related to the retail management occupational field in Canada and in other jurisdictions, retail management education in Canada and other jurisdictions, and the broader field of management education. This analysis determines that the discursive themes presented in the data are supported by other, broader discourses about the legitimising effect of retail management credentials on the professionalisation of retail management and about how the Canadian retail management education field needed those credentials. The sources and exemplars of the broader discourses are displayed in Table 5.5.

Table 5.5 Support from Broader Discourses

Broader Discourses	Sources	Exemplars
RM is an important economic and societal contributor	Academic literature State of Retail: The Canadian Report 2010, Industry Canada, Government of Canada http://www.ic.gc.ca/eic/site/retra-comde.nsf/eng/h_qn00281.html?Open&pv=1	Levy et al., 2011; Martin, 2010; Sparks, 1992 "The retail sector is a vital part of Canada's economy and society. The direct contribution of retail trade to the economy was \$74.2B in 2009, representing 6.2 percent of Canada's gross domestic product (GDP). The rate of Canada's retail sector GDP growth was 34 percent faster than the U.S. retail sector and 96 percent greater than the Canadian economy between 2004 and 2008. Retail employment grew 2.4 percent per year from 2002 to 2009 while employing 2.0 million people, or 11.9 percent of the total working population in 2009."
	University of Alberta, B. Com, Retail & Services major website http://www.business.ualberta.ca/Programs/BachelorOfCommerce/ProspectiveStudents/AboutBcom/BcomMajors/RetailingAndServices.aspx	Retail is the engine that drives the global economy. It is the sophisticated business operations of the world's largest (and smallest) companies.
There is a dearth of Canadian retail management education.	Academic literature A Changing Retail Landscape, (2009), Retail Council of Canada http://www.retailcouncil.org/training/research/industry/rcc_hrtrends_eng_20091202.pdf	Evans et al., (1992); Martin, 2010 However, university-trained workers occupy a below-average share of the available positions in the sector. Retail has a rather lower portion of workers with higher education than the labour force in general.
	Ted Rogers School of Retail Management Periodic Program Review, 2009, p.4	The proposal compared the disparity between academic qualifications among executives in the American vs. Canadian Retail industries. A demonstrated need for university education at all levels of management (entry/middle/senior executives) in addition to life long learning options (courses and/or certifications) was cited as one rationale for the creation of a Commerce Degree that would focus on Retail.
External changes provide threats/ opportunities to Canadian retailing.	Academic literature	Burns & Rayman, 1995; Freathy, 1997; Jones et al., 1994; Levy et al., 2011; Martin, 2010) Merkel et al., 2006; Serpkenci & Tigert, 2010
	University of Alberta, B. Com, Retail & Services major website http://www.business.ualberta.ca/Programs/BachelorOfCommerce/ProspectiveStudents/AboutBcom/BcomMajors/RetailingAndServices.aspx	Retailers are looking for talented university graduates who can lead their organizations into a fast-paced, technology-drive and customer-oriented future.

Broader Discourses	Sources	Exemplars
Retail management education and management education programs develop professional workers	Academic literature	Baldwin and Gu, 2008; Hart et al., 1996; Knight et al., 2006; Martins, 2010; Michener, Shim et al., 2002
	American Collegiate Retailing Association website http://acraretail.org	Organizational Goals: The following goals have been established through exchange of information and the development of professionally related activities among the members: <ul style="list-style-type: none"> to enhance the professional development of the membership to promote retail management as a profession to maintain and elevate standards of education among schools and colleges offering courses in retailing to strengthen the retailing curriculum offered by schools and colleges to advance the status and prestige of our discipline through professional and social activities
	Ted Rogers School of Retail Management website http://www.ryerson.ca/tedrogersschool/rm/	As the only school of its kind in Canada, students will be provided with a targeted Bachelor of Commerce education, which includes theory and practical experience, for those who wish to become in-demand business management professionals at the forefront of the retail industry... The structure of courses and their content were informed by the fundamental requirements of a business degree and from the analysis of retail degree programs in other countries. There were no benchmarks within Canada and so the original curriculum set the standard for retail management education at the university level... p. 3
	Open University Foundation Degree in Retail Management website http://www3.open.ac.uk/study/undergraduate/qualification/x14.htm	The Foundation Degree in Retail Management will also help you develop: an understanding of concepts and analytical approaches; problem-solving skills; and practical and professional skills that will enhance employability.
Retail management is an unprofessional career and retail management education makes it more professional	Academic literature	Anderson et al., 1992; Broadbridge., 2003; Broadbridge et al., 2009; Commins and Preston, 1997; Mobley, 2004; Swinyard, 1981; Swinyard et al., 1991
	A Changing Retail Landscape (2009, Retail Council of Canada http://www.retailcouncil.org/training/research/industry/rcc_hrtrends_eng_20091202.pdf)	It appears that the widespread belief about retail being an 'accidental career' does not reflect the views of a sizeable portion of the workforce. More than half of the employees (54%) and almost two thirds of managers (60%) were deliberately seeking a job in retail when they found their current job. Post secondary training needs to be visible as a criterion in hiring, including being mentioned in job postings.
	Ted Rogers School of Retail Management Periodic Program Review, 2009	In fulfilling its mission the school sees itself as having a unique voice in the promotion of retailing as a career – advancing the professionalism, international network and academic quality of program and its graduates... At its inception the Bachelor of Commerce Degree in Retail Management was to prepare students for professional careers in the retail/distribution sector or for

Broader Discourses	Sources	Exemplars
		further postgraduate studies in this, or related areas....p.2
Retail management needs a sector-based degree	Academic literature Ted Rogers School of Retail Management Periodic Program Review, 2009	Armstrong and Sadler-Smith, 2008; Donnellan, 1996; Hart et al., 1999 The Ted Rogers School of Retail Management is the centre of retail education in Canada. The Retail Management programs were for education to respond to the unique needs of the modern retail industry. The original proposal included long-term plans to develop, "technology-based, distance delivery of the entire program..in order to deliver university level, retail specific education across Canada". Access to the program would be beneficial to the industry and aspiring future managers, as no such retail management degree existed elsewhere in the country.
Retail management education needs interorganizational support	Academic literature	Currah and Wrigley, 2004; Donnellan, 1996; Hart et al., 1999; Livingstone and Parkhurst, 2009
Corporate University partnerships	Academic literature	Meister, J.C., 1999
Management education has a focus on competencies	Academic literature National Retail Federation http://nrfoundation.com/content/certification-retail-management Seneca College website http://www.senecac.on.ca/fulltime/BAR.html	Dalton, 2010; Donnellan, 1996; Hart et al., 1999; Keech, 1998; Kelley, 1998; Mintzberg, 2005; Mobley, 2004; Wright & Race, 2004 Certification Programs http://nrfoundation.com/content/certification-retail-management A career in retail management demands a specific set of skills and competencies, from balancing receipts to buying and managing merchandise.

Table 5.5, shows that there is evidence of support in these discourses for the discursive themes identified in this analysis. This support substantiates the notion that the discursive work performed in the ESR case is likely to produce institutions. The analysis also shows evidence of how challenges from competing discourses were countered in the ESR discursive work.

c) Patterns in Challenges Encountered from Competing Discourses: The analysis shows evidence of two competing discourses. These competing discourses are produced in newspapers distributed to the Ryerson community and the general public. They focus on perceptions of retail management as a career and of Eaton's role in the development of retail management education.

The data also shows evidence of countering discourses for both of the competing discourses. The countering discourses are produced by actors with legitimate rights to speak and in genres that are distributed to recipients who received the competing claims. The credibility of the countering discourses is established by providing a consistent frame of reference by credible claimsmakers (Benford and Snow, 2000). Examples of the two competing discourses and the related countering discourses are discussed below.

The first competing discourse focuses on the unattractive nature of retail management as a career and implicitly argues that it is not worthy of retail management education or professionalisation. An example of this competing discourse is presented in an article in the Ryerson student newspaper. The countering discourse #7 *"Retail management education makes retail*

management a more attractive and professional career “ is presented in the same story by the ESR General Manager and it is a moral evaluation claim that compares retail management to another service industry career.

“bristles at the suggestion people don’t think of retailing as a career. I don’t think retailing is any less competitive as a career option than the banking industry. And he hopes more people will see it that way after Ryerson launches a new degree in Retail Management.”Document #18

Another example appears in a national newspaper article about the Needs Analysis report commissioned by the IAS Committee. The competing discourse refers to Eaton’s viability, thereby challenging its authoritative legitimacy as a retailing role model and its legitimate right to speak about retail management as a career. It is countered in the same story by a Ryerson faculty member who co-produced the report and presents a rationalising argument about the tenure of retail management as a career.

“With many chains in financial trouble, including the 15,000 employees of the T. Eaton Co. Ltd., parents are often nervous about their children entering the retail field...there is a big stigma out there about working in retail. This shows people who work in the industry, stay with the industry.”...Document #66

The second competing discourse is about the legitimacy of corporate involvement in the development of the university degree (Table 5.3, IW Discourse # 8). Specifically, it claims that Eaton’s dominated the programme for its own means and that the programme was not good for Ryerson. It makes a moral evaluation claim about the legitimacy of corporate/university partnerships, because they contravene the institution’s boundaries. The University made specific moral evaluation counter arguments refuting Eaton’s heroic role and emphasising the generalised membership ties of CRMEP, and the Eaton Chair of

Retailing. There is also evidence that the ESR actors anticipated this competing discourse about corporate involvement and inoculated against it when creating IW discursive themes #1-7 and 11-16 (Table 5.3). The following quote from *The Eaton Legacy* illustrates this discursive inoculation.

“very early in our discussions with them it became clear that this was something the whole retail sector needed. Eaton’s and Ryerson’s commitment was that **we should endeavor to work with the entire retail sector to develop a retail management program**, and we’re on the path to Canada’s first four-year degree program in retail management.”
...Document #3, p. 12

In 1996 and 1997, the *Globe and Mail*, a national newspaper published the following discourses questioning Eaton’s involvement.

“Predictably, competitors snipe that **the endeavour is just a vanity exercise for Eaton’s**... Business associates or consortia sometimes band together to pick up the tab, as in the case of the Eaton Chair in Retailing at Toronto’s Ryerson Polytechnic University, which was bankrolled by the company’s suppliers and other Eaton family cronies.”...Document #67

Ryerson countered with a Letter to the Editor written by the chair-holder of the Eaton/NSERC/SSHRC Chair in the Management of Technology in Retailing, providing expert legitimization. The letter includes three countering discourses:

- a. correcting the name to reflect the contribution of the private sector to the endowment and the provision of Federal granting council financial commitments for research and operating costs
- b. correcting the membership “though the private sector involvement is led by Eatons, contributions have also been received from several of Canada’s major corporations – Sears (Canada), IBM, Bell Canada, RBC Dominion Securities -.hardly, Eaton cronies.
- c. clarifying that there are two Chair holders and an Advisory Board that does not dictate the nature and range of the research...Document #85

The discourse about Eaton’s involvement also surfaces in a trade publication for the human resources professional community. The article includes a counter argument from the Dean of Ryerson’s CE Division, providing expert legitimization.

"There was pressure to move quickly, but never to cut corners. In fact, **Eaton's and Ryerson officials alike are adamant that the courses are Ryerson's property.** What's more, they like it that way: Eaton's wants the credibility of the stamp of the university on the courses; **Ryerson does not want to be, or seem to be, merely a pawn for Eaton's training needs.** Still, individual players are taking a role in issues such as scheduling of the courses (there are fewer in the pre-Christmas rush period, for instance), creating liaisons with other universities to offer the courses elsewhere in Canada and a commitment to a CD-ROM and distance education, the better to reach an industry which exists in every community."...Document #75

This second competing discourse also appears in an internal student newspaper at Ryerson.

"increased corporate funding could compromise academic freedom. But so far, his ethical debate has been ignored."...Document # 15

The counter discourse is presented in other student newspapers, and appears as a quote from Ryerson's CE Director.

"Despite the financial influence of Eaton's, Ryerson officials maintain the program will be part of Ryerson and not Eaton's."...Document #18

In summary, the analysis of discursive work shows patterns in the ways that the discursive themes are internally coherent, are supported by broader discourses and counter competing discourses. These dimensions are consistent throughout the process and constitute moral evaluative and expert legitimating strategies.

This analysis is followed by an examination of the nature of the genres of texts produced throughout the process.

5.6 Analysis of Patterns in Texts

Inspired by the DMI (Phillips et al., 2004), this study asserts that certain texts influence and become embedded in discourse. The characteristics include whether the actors that produced the texts a) have a legitimate voice (see

Section 5.3), b) whether the texts evoke other texts and discourses for legitimacy or meaning (see Section 5.5), and c) whether the genres of the texts are recognised communication vehicles. This analysis examines the nature of the genres of the texts produced and distributed during the case.

Embedded texts are those that are adopted and used by other organisations, and they possess certain characteristics that contribute to the likelihood of their adoption. Specifically, texts that take the form of genres, which are recognisable, interpretable, and usable in other organisations, are more likely to become embedded in discourse than texts that do not. This analysis refers to Maguire's (2004) model of Artifact-Constituting Discourses as a framework for categorising text genres. The genres represent organising mechanisms which are recognised types of communication and often provide easily recognisable templates.

This analysis categorises discourses according to types of genres and groups them according to important texts they include, the main IW activity they perform, who produced them, and to whom they were distributed (Table 5.6).

Table 5.6 Genres of texts producing discursive work

	Marketing discourse	Technical discourse	Field discourse	Popular discourse	Policy discourse	Reflective Purposeful Discourse
Important types of texts	Advertisements, brochures	Research reports	Newsletters Media Articles – trade publications	Media articles Newspapers, trade publications, popular press	Reports of government committees	Legacies, brochures, booklets, case studies
Main IW activity in arena	Defining degree requirements	Educating and Creating normative associations	All	Changing Normative Associations	Changing Normative Associations	Theorising
Text producers	Universities Retailers Industry Associations	Academic researchers	Industry associations Trade media	Journalists	Educational institutions, government bureaucrats and administrators	Universities Academic researchers Retailers
Text consumer	Potential students, Employers, Parents	University community, retailing and Business community	Retailing and HR communities	General public	Government bureaucrats and administrators, university community	University community Business community

Source: Developed for this Study

The following sections discuss the patterns evident in the genre classifications presented in Table 5.6.

5.6.1 Marketing Genres

Marketing genres refer to texts (including their production and distribution) produced with the explicit purpose of increasing registrations from retailers, employees and high school students in ESR, CRMEP, and the Retail Management degree as described in *Presentation of IAS Sub Committee #4: Promotion and Marketing of the Canadian Retail Management Education* (Document #45).

- “1. Build excitement among retailers about the bottom-line value of a smart workforce and about the potential of the Canadian Retail Management Education Program to continuously develop their workforce.
2. Cultivate the support of retail and supplier associations to raise the value that their members place on an educated workforce and to promote this program to their membership.
3. Gain input from retailers and their associations into the design of program content and delivery systems for this Canada-wide program.
4. Build enrolment in the program as different formats are offered: Intensive, semi-intensive and evening classroom-based courses, and electronic distance delivery formats utilizing CD-ROM, videoconferencing and Internet.”

“Each of the communications products would describe the wide variety of careers available in retail. The image of retail as an exciting, diverse and challenging career would be stressed to high school and younger university students, as well as employees already working in entry-level positions in the industry. Without **continued marketing and promotion**, the message of retail as a career choice won’t get out, and our initial efforts will not be as effective as they could be.” ...p.2

These genres include brochures, an information booklet, presentation outlines, and registration flyers. There are patterns in the timing, producers, distribution, purpose and IW, and legitimization strategies of these marketing genres (Table 5.7)

Table 5.7 Marketing genres over time

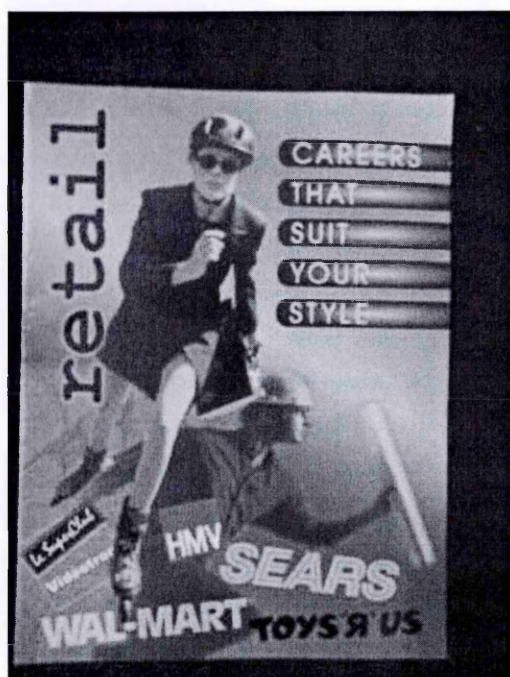
Year	Document	Description	Producer	Distribution	Purpose	IW	Legitimation
1997	#8 Retail & Services Management I	Brochure -Course listing and descriptions	Ryerson	General public, Ryerson and Retail communities	Build enrollments	C:D	Rationalisation: Instrumental
	#14 Retail Management – Internet course descriptions	Brochure -Internet course descriptions	ESR and Ryerson	Potential CE online students	Build enrollments	C:CNAD E	Rationalisation: Instrumental
	#26 Make the Most of it: Tips for Students	Information booklet - Study tips for part-time, working students	CRMEP	Enrolled CRMEP students	Provide support for students	C:E	Rationalisation: Instrumental
	#32 Canadian Retail Management Education Program Overview	Presentation outline	IAS	Retail community	Build excitement, cultivate support from retail community	C:D	Rationalisation: Instrumental
1998	#13 Certificates in Retail and Services Management	Brochure – Certificate courses, requirements	ESR and Ryerson	Potential students, Academic community	Build enrollments	C:D	Rationalisation: Instrumental
	#7 Retail Management Program	Registration Flyer- Degree courses, requirements	Ryerson	Ryerson and Retail communities, General public	Build enrollments	C:D	Rationalisation: Instrumental
1999	#19 Retail Careers that Suit your Style	Promotional materials for high school presentations including speeches, brochures	NSAS	Retail community, High school students	Cultivate support of retail community, build enrollments through high school students	C:CI C:TPJC	Moral evaluation: Abstraction

- a) *Timing*: These marketing texts are produced at the end of the second Phase in 1997, and throughout the third Phase, representing the progression of the process from formation to instantiation.
- b) *Producers*: Marketing genres are produced by individual actors (i.e. Ryerson and RCC) and also by multiple collaborative actors.
- c) *Distribution*: The marketing genres are distributed to the general public, retail community, Ryerson community, current students and high school students, thereby targeting potential students. Specific marketing information is distributed to recipients with specific interests – i.e. potential Continuing Education (CE) online students received Internet course descriptions.
- d) *Purpose*: In addition to the purposes described in the IAS quote (Section 5.6.1), marketing materials are produced to provide support for students already enrolled in CRMEP courses and to build enrolment from high school students.
- e) *IW and Legitimation Strategies*: These marketing genres utilise legitimization strategies of instrumental rationalisation that provide how-to information for enrolment, and moral evaluation about why the courses were important and why retail management is a career.

The majority of the marketing texts form Defining (C:D) IW because they provide information about the requirements of the certificates and degrees. However, educational materials produced by the NSAS and distributed to high school students

by the RCC (Document #19) are specifically oriented to IW that relates retailing to a fun, dynamic career, thereby constructing the career identity (C:CI) and performing Educating IW (C:E).

Picture 5.2 Document #19 NSAS Educational materials



These marketing genre texts are also distributed to the internal Ryerson community, so that recruiting efforts are facilitated. This distribution provides moral evaluation and rational instrumental legitimation for this audience, so that Ryerson admissions staff is equipped to promote the programme. This need is illustrated in the following quote from the interview with the CE Director.

“For new recruits coming in to the program, we **had difficulty getting the Ryerson admissions people to even include retail** in the kinds of programming they promoted when they did high school visits because there was that same kind of unstated bias about this is dirty fingernails kind of work and do we want to be associated with it.”...Interview C, Lines 204-210.

Whereas marketing texts are produced to increase registrations, technical genres are produced to add to bodies of knowledge. The technical texts produced throughout the ESR data are analysed in the following section.

5.6.2 Technical Genres

Technical genres are texts produced to add to a body of academic or research-related knowledge. There are patterns in the types of texts, purposes, timing, distribution, and in the producers and the legitimation strategies they used. These patterns are shown in Table 5.8 and discussed following the Table.

Table 5.8 Technical Genres over Time

Date	Document	Description	Producer	Distribution	Legitimation
1996	#23: The Training Technology Monitor Five: Learnware in Prototype Eaton School of Retailing and Ryerson Polytechnic University - Partnering for Learnware: Critical Success Factors in the Use of Learnware by the Human resources Sector Councils and Industry Associations in Canada	Newsletter and case study	Federal Government	Education community	Authorisation: Expert
1997	#34 Launching and Managing a Corporate University: How Eaton's is Showing Success in Transforming Capital into a Competitive Advantage	Guide	Federal government	Retail community, Ryerson community	Authorisation: Expert
	#44 Getting the Most out of Learning: A Qualitative Evaluation of the Eaton School of Retailing	Research report	Ryerson	Ryerson community, Retail community, Government administrators	Moral evaluation: Abstraction Authorisation: Expert
	#83 Harvard University Graduate School of Education: Eaton School of Retailing Case	Academic case study: Learning material	Academic community	Academic community	Authorisation: Expert
1999	#20 Virtual Course Design for Educators & Trainers: The Evaluation Model for Technology Enhanced Learning in Retailing	Report & Training Manual	Federal government	Distance education community, Government administrators, Academic community, Retail community	Authorisation: Role model
	#31 A Model for Developing Intellectual Capital in Retailing	Presentation notes	CRMEP	RCC, Retail community	Authorisation: Role Model Rationalisation: Theoretical
	#81 Corporate Universities: Lessons in Building a World-Class Work Force	Book chapter	NSAS	NSAS committee members, Academic community – corporate university interest groups	Rationalisation: Theoretical

a) *Types of texts:* These texts include case studies, training manuals, research reports, presentation notes, and a book chapter.

b) *Purposes:* These texts (Documents #20, 23) add to the body of knowledge about developing and evaluating distance education programmes as illustrated in this quote from the *Virtual Course Design for Educators & Trainers: The Evaluation Model for Technology Enhanced Learning in Retailing* document.

“In the spring of 1997, the federal Office of Learning Technologies provided the Ryerson/Eaton’s alliance with \$125,000 in funding to develop a sophisticated toolkit to help education and training organizations identify techniques for testing and evaluating distance education courses. **The purpose was to examine the effectiveness of various technologies and develop an evaluation model** for distance learning, including a toolkit of best techniques for evaluating and testing.”...Document #20, p.4.

The texts (Documents #34, 44, 81) also contribute to the body of knowledge about developing corporate-university partnerships, as the following quote from *Getting the `Most Out of Learning: A Qualitative Evaluation of the Eaton School of Retailing* illustrates.

“The purpose of the Centre for Research on Lifelong Learning, established in September 1995, was **to develop strategies to encourage effective learning at both the organizational and individual levels**. The result was a research report entitled “Getting the `Most Out of Learning A Qualitative Evaluation of the Eaton School of Retailing”...Document #44, p.4.

The texts (Documents #31, 83) also contribute to the body of knowledge about developing a retail management degree. For example, the Harvard Graduate School of Education produced a case study of the ESR (Document #83) which focuses on the retail management degree development process.

c) *Timing:* Because these texts chronicle the development of the ESR process, they were produced in Phases Two and Three in 1996, 1997 and 1999.

d) *Distribution*: Technical genres are distributed to the retail and academic communities, including distance education and corporate university interest groups, thereby influencing the normative nature of the degree development process with these groups.

e) *Producers and Legitimation Strategies*: The federal government produced several of these texts using authorisation (expert) and role model legitimation strategies – i.e. these texts are produced as examples to be followed, thereby providing normative guides. As a formal research report, the *Evaluation of the ESR* (Document #44) also provided expert legitimation, as did the Harvard Graduate School of Education case study (Document #83). The chapter from Meister's (1999) book (Document #81) was explicitly distributed to NSAS Committee members to rationalise theoretically the process.

Whereas technical genres are produced to add to bodies of knowledge, field genres are produced to inform the opinions of specific recipients. The analysis of patterns in the field genres produced throughout the case is discussed in the following section.

5.6.3 Field Genres

Field discourse genres are texts produced to inform opinions. The analysis of these genres show patterns in the distribution, producers (categorised by number of texts per year), types of texts and the related IW and legitimating strategies used. These patterns are displayed in Table 5.9, and discussed following the Table.

Table 5.9 Production and Distribution of Field Texts

Distribution	Producer	Type of Text	Legitimation Strategies
Eaton's internal community	Eaton's (2) 1995 & 1997	Visioning Report	Rationalisation: Theoretical
Ryerson community	Ryerson 1995 (4), 1996 (1), 1997 (2)	Student magazine articles	Moral Evaluation: Abstraction
Retail community	Trade Media 1995 (5), 1996 (6), 1997 (1), 1998 (1)	Membership newsletter and magazine articles	Rationalisation: Instrumental, theoretical Moral Evaluation: Abstraction Authorisation: Expert
	RCC 1995 (1), 1996 (2)	Membership magazine articles	
	CRMEP 1996 (2), 1997 (1), 1998 (1)	Newsletters	
HR and Business	Trade Media 1995 (1), 1996 (1)	Membership magazine articles	Moral evaluation: Abstraction
Academic community	Canadian universities 1995(2)	Internal magazine articles	Rationalisation: Instrumental, Authorisation: Expert & Personal
	Research Centre 1995 (1)	Membership newsletter articles	
	AACSB (Accrediting Body) 1996 (1)	Membership Newsletter article	
Distance Education	Federal government 1997 (1), 1998 (1)	Newsletter for distance educators	Rationalisation: theoretical
Corporate-university	Trade Media 1996 (2)	Membership magazine article	Rationalisation: Instrumental
Business and Retail communities	Conference Board of Canada 1996 (1) Retail Council of Canada 1996 (1)	Awards	Moral evaluation

a) Distribution: These are texts produced for distribution in specific constituent communities including:

- Eaton's internal community,
- Ryerson's internal community,
- Retail sector community,
- Human Resource professionals and general business community,
- Academic community, including 2 distinct subsets of special interest groups
 - Distance education (DE) community
 - Corporate university (CU) community

b) Producers, Types of texts, IW and Legitimizing Strategies: Important genres include internal publications, trade publication articles and industry association newsletters, and both are produced for their constituent membership. These texts use multiple legitimating strategies of rationalisation (theoretical and instrumental),

moral evaluation, and authorisation (expert). None of these texts are produced during Phase 1; all of the field genres of texts are produced in Phases 2 and 3, and influence the opinions of specific constituents of the retail management education field. These constituents include the internal Eaton's and Ryerson communities, the broader Canadian retail community, the Canadian human resource (HR) and business communities, the broader academic community, the Canadian distance education community, and the corporate-university community.

The analysis shows that Eaton's produced two field genre texts which provide theoretical rationalisation legitimisation for their internal employees. These texts are reports about Eaton's Vision for the ESR and include the *Eaton's 2000: 1995 Year End Report* (Document #1) and the *Overall Direction for the Eaton School of Retailing from 1997 to the year 2000* (Document #2).

Ryerson also produced seven field genre texts from 1995 to 1997, which are directed at their students, and are student magazine articles (Documents #94, 95, 97, 100, 16, 17). These articles utilise moral evaluation strategies to legitimate the process with Ryerson's internal audience.

The analysis shows that field texts targeted at the retail community are distributed in trade publication articles and are distributed in the apparel, home and hardware, housewares, furniture, and discount store communities. In addition, industry association newsletters include articles about the retail management degree development process and are distributed to their membership including the Ontario Apparel Manufacturers' Association (Document #86) and Gift and Tableware

Association (Document #72). These articles used instrumental, theoretical rationalising and endorsing legitimisation strategies.

The majority of these articles (11/13) distributed by trade media are published during Phase 2 in 1995 and 1996, and are therefore focused on forming opinions in the retail community during the Formation Phase.

In addition to the newsletters distributed to the retail community, The Retail Council of Canada (RCC) produces three articles about the process in their magazine, the *Canadian Retailer* (Documents #87, 73, 80), which provide endorsing legitimisation and are distributed to their membership.

The CRMEP also produces a series of newsletters for its participants (Documents #27, 28, 29, 30), which help to form opinions with these participants from 1996 to 1998. These texts provide legitimacy through theoretical rationalisation of how retail is truly a career. Picture 5.3 shows an exemplar of the Retailing as a Career Newsletter.

Picture 5.3 Document #27 Retailing as a Career Newsletter



The analysis also shows that field genres of texts are produced for the human resource (HR) and business communities through articles in the Human Resources Professional magazine (Documents #89, 69) which provide moral evaluation and endorsing legitimization during Phase 2.

Field genres of texts are also produced for distribution to the broader academic community by other Canadian universities (Documents #91, 99) and the Centre for the Study of Commercial Activities newsletter (Document #98). These texts provide instrumental rationalisation and endorsement of the degree development process with more institutionalised university communities. In addition, the Association to Advance

Collegiate Schools of Business (AACSB) is a global business school accrediting body and their article (Document #77) presents an expert authoritative and endorsing legitimating text for the IW of Constructing Normative Networks (C:CNN).

The analysis shows that the federal government produces two newsletters (Documents #22, 21) for the distance education community in 1997 and 1998, thereby providing theoretical rationalisation and endorsement legitimization for the innovative delivery methods used in the ESR process.

Trade media directed to the corporate-university community also produces two articles about the process (Document #35, 76) which provide information about best practices, and thereby provide instrumental rationalising legitimization.

Finally a particular type of field genre that provides moral evaluative legitimacy for the collaborative process is awards. In 1996, the development process won two awards. The Conference Board of Canada presented the programme with an award for Best Partnerships (Document #82). The RCC also presented the programme with an award for best programme development (Document #73). These awards provide moral evaluation legitimization for the process with the business and retail communities which conferred the awards.

Whereas field genres are produced to inform opinions in specific field populations, popular genres are produced to inform opinions in the general public. The analysis of these popular genres is discussed in the following section.

5.6.4 Popular Genres

Popular discourses refer to the texts produced to inform lay opinions which are distributed to the general public. Because university degrees are publicly funded, the opinion of the general public is important to university administrators. Important genres are newspaper articles and letters to the editors.

A pattern in the timing and legitimation strategies of these texts is present in the data. Eleven (11) general media (i.e. local and national newspaper) articles are published in 1994 in the inception Phase of the development process. These articles (Documents #57-64, 101, 102) present moral evaluation and rationalising (theoretical and instrumental) legitimating strategies about the threats posed by US retailers, the establishment of the Eaton Retail Chair, and the need for a Canadian retail management degree.

5.6.5 Policy Genres

Policy discourses are texts produced to change funding and regulatory frameworks. The data are analysed for evidence of policy genres and for their producers and the IW discursive actions the texts perform. This analysis is charted in Table 5.10 and the patterns are discussed following the Table.

Table 5.10 Policy Genres over Time

#	Producer	Description	1993	IW	Legitimative Strategy
84	Ryerson	Contract for Services with Eatons – EATONS School of Retailing	1993	C:CNN	Authorisation: Impersonal
4	Ryerson	Report: The Structure of Demand and Societal Need for Retail Education with an Emphasis on Ontario	1996	C:A C:CNA	Rationalisation: Theoretical Moral evaluation: Evaluation
5	Ryerson	Report: Retail Management Education: A Review of Current Undergraduate Programs		C:D, C:CNA C:M	Rational Theoretical, Conforming
9	Ryerson	Brochure: The Eaton Chair in Retailing		C:T	Rationalisation: Theoretical
10	Ryerson	Proposed 5 year Work Plan: Eaton NSERC-SSHRC Chair in the Management of Technology in Retailing		C:D	Rationalisation: Theoretical
36	IAS	Report: The Canadian Retail Industry & Skill Standards		C:D	Rationalisation: Instrumental
37	IAS	Report: IAS-Human Resources Development Canada: ESR Careers in transition Job Search/Job related skills committee		C:D	Rationalisation: Instrumental
41	IAS	A Presentation to the IAS Committee: The Structure of Demand and societal Need for Retail Education with an Emphasis on Ontario		C:A, C:CCNA C:TPEP	Rational Theoretical, Moral evaluation Abstraction, Endorse
45	IAS	Presentation of IAS Sub Committee #4: Promotion and Marketing of the Canadian Retail Management Education		C:E C:TPBOK	Rational: Theoretical Endorsement
6	Ryerson	Report: Analysis of Educational Needs Assessment of Retail Employees	1997	C:CAN C:TPBOK	Rationalisation: Theoretical Moral evaluation: Abstraction
38-40	IAS	Reports: IAS-Human Resources Development Canada: ESR Careers in Transition Job Search/Job related skills committee (#38=membership list)		C:D	Rationalisation: Instrumental
42	IAS	Membership List: Steering Committee IAS Initiative for Retail Educational Programming		C:CNNE	Authorisation: Expert
46	NSAS	Proposal to the Office of Learning Technologies: Development of an Evaluation Model for Technology Enhanced Learning in Retailing		C:A	Rationalisation: Theoretical
47	NSAS	Report on the Industrial Adjustment Services Initiative in Retail Management Education		C:A, C:TPEP	Rational Theor, Instrum, Endorse
48	IAS	Proposal to Department/School Councils for an Undergraduate degree in Retail Management		C:A	Authorisation: Impersonal Rational Instrumental, Endorse
50	IAS	Proposal for Creation of NSAS Committee		C:A, C:TBOK C:CNN	Rationalisation: Theoretical Authorisation: Expert
51	NSAS	Membership list: NSAS Steering Committee		C:A, C:TBOK	Rationalisation: Instrumental
52	NSAS	Proposal NSAS Initiative Career Awareness & Technology Enhanced Learning in Retailing		C:A, C:TBOK	Rationalisation: Instrumental
53	NSAS	Proposal for Creation of a Retail Sector Initiatives Fund Curriculum Committee	1999	C:A, C:TBOK	Rationalisation: Instrumental
43	NSAS	Occupational Standards: Delivering retail professionalism-A Report: Retail 1 st level manager		C:D, CTPEP	Rationalisation; Theoretical
49	ESR	Summary of Funding		C:V	Authoris Impersonal, Endorse

Table 5.10 shows that there are multiple temporal patterns in the production, distribution and legitimization strategies which are related to the type of IW these policy texts perform. The majority of the policy texts are produced in 1996 and 1997. Proposals and reports are produced to secure funding and commit to plans of action to move the development process from formation to instantiation. All of the policy documents except two are distributed to government administrators and the Ryerson community, thereby providing the documentation required to secure the funding and approval for the next phase of development. The following exemplar from *The Report on the IAS Initiative in Retail Management Education* summarises how proposals and reports provide incremental discursive support and legitimization through theoretical/instrumental rationalisation and endorsement for the ESR process.

“Sub-Committee determined the need and level of support for university-level retail management education within the retail sector, **including “The Structure of Demand and Societal Need for Retail Education, with an Emphasis on Ontario”**. The second study focused on the educational needs and priorities of existing retail professionals (Analysis of Educational Needs Assessment of Retail Employees). The work of sub-committee #1 supported the belief that more retail education was needed, both for potential employees coming out of high school, college or university, and for employees already working in the industry. **The committee’s main report, “Proposal to Department/School Councils for an Undergraduate Degree in Retail Management”, strongly advocated the development in Canada of a four-year degree in retail management,** suggesting that it would prepare students for careers in the retail sector or to engage in postgraduate studies in retail or related areas.”... Document #47, p.6.

This exemplar shows how Documents #4 and 41 present theoretical rationalising and endorsing legitimization of the need for a degree. Both perform IW by Changing the Normative Associations (C:CNA) about public-private degree programme development and about the professional nature of retail management, including the need for a Canadian retail management career. This form of IW converges with Advocacy IW because these policy reports contribute to funding and credentialing processes.

A significant pattern in the production of policy genre texts during 1997 is that the majority form Advocacy IW (Documents #46, 47, 48, 50, 51, 52, 53). These Advocacy proposals produce impersonal authorisation and endorsement legitimacy because they contribute to funding and credentialing processes. These texts are produced to secure academic approval for the Ryerson University certificates and the four-year Bachelor of Commerce degree programme, the distance education delivery of the Ryerson programmes, the occupational standards for retail management, and career development materials for retail management as a career. An example is Document #48 (*Proposal to Department/School Councils for an Undergraduate Degree in Retail Management*), which was distributed to the Ryerson community in compliance with University Senate requirements for degree approval.

Two of the texts produced are membership lists (Documents # 38 and 51) which provide expert authorisation for the interorganisational collaborations involved with the second phase of the process, thereby performing IW through Construction of Normative Networks (C:CNN).

Two further texts are produced in 1999. The first is a *NSAS Report on Occupational Standards for Retail First Level Managers* (Document #43) which constituted specific educational requirements for retail managers thereby providing rational theoretical legitimisation for professionalism in the occupation. The second is a summary of the funding secured for the development which illustrates the contributions from the public sector and the retail sector. This document is the only policy document

produced that reflects the Vesting IW performed in the data and it provides impersonal authoritative and endorsing legitimization of the process (Table 5.11).

Table 5.11 Summary of Funding

Source	Purpose	Government contribution	Retail Sector Contribution
Federal government 1995	Development and implementation of Vision 2000 Committee <ul style="list-style-type: none"> • Needs assessment of ESR • Benchmarking best practices corporate universities and retail academic university programs 	\$200,000	\$233,000
Federal Government - 1996	RME/Vision 2000 Committee <ul style="list-style-type: none"> • Determine need and level of support for a degree • Develop course content • Define issues in course delivery • Develop strategies for promotion/communication • Determine need for occupational and skills standards 	\$296,300	\$1,206,200
Federal Government Office of Learning Technology	Develop evaluation model CRMEP distance education	\$125,000	\$218,200
Federal Government National Sector Adjustment Services Initiative	<ul style="list-style-type: none"> • Occupational Skill Standards and Certification • Career Awareness and Technology-Enhanced Learning in Retailing • Documentation 	\$742,400	\$1,711,700
Federal Government SSHRC and NSERC Award	Eaton Chair in Retailing	\$650,000	
Provincial Government Ontario Sector Initiatives Fund	Develop curriculum for CRMEP courses, to include some distance education delivery	\$250,000	\$410,000
Eaton Foundation	Develop CD-ROM for distance education delivery of CRMEP courses		\$125,000
Ryerson University	Develop CD-ROM for distance education delivery of CRMEP courses		\$26,000
Retail Industry	Eaton Chair in Retailing pledges		\$2,200,000
Bell Canada	Distance education curriculum development		\$330,000
TOTALS:		\$2,263,700	\$6,470,100

In addition, several policy texts perform Defining IW throughout the second Phase. By defining the requirements and rule systems for the certificates and degree, this form of IW confers the body of knowledge and specific educational requirements involved with professionalisation. The lists of requirements leave traces/cues that

secure and communicate impersonal authorisation legitimacy and the iterative nature of the texts in which they were included is summarised in Table 5.12.

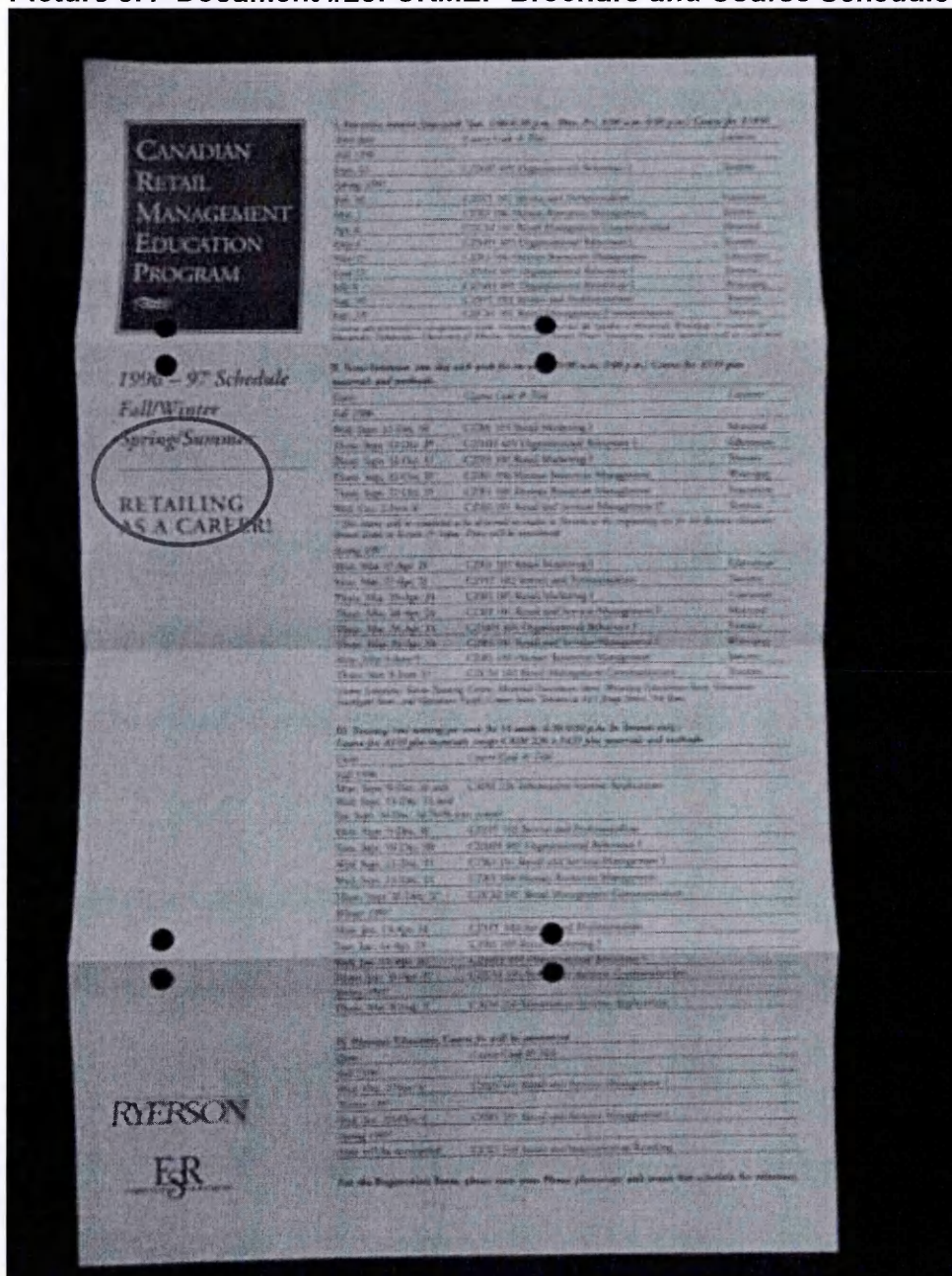
Table 5.12 Defining – Retail Management Degree Programme Requirements

Lists	Related texts (in which they appear)
Certificates	#4, 12, 13, 14, 25, 47, 53, 81
Degree	#12, 31, 48
Occupational Standards	#43

As illustrated in Table 5.12, the Defining lists for the Retail Management Certificates and Degree are iterative and provide substantiating evidence of the internal coherence of the texts (see Section 5.5). This coherence contributes to the institutionalising nature of these texts.

In addition, Document #25 (Picture 5.4) shows a listing and schedule of courses that illustrate “Retailing as a Career”, thereby providing IW (i.e. Constructing Identities, C:CI) in the construction of the Retail Management occupational identity, by defining course requirements.

Picture 5.4 Document #25: CRMEP Brochure and Course Schedule



Finally, many of the policy texts perform multiple forms of IW, including Document #5, *Retail Management Education: A Review of Current Undergraduate Programs*, which performs Defining, Changing Normative Associations, and Mimicry IW. The text provides theoretical rationalising legitimacy for the programme's content (Defining),

collaborative development (Changing Normative Associations), and conforming legitimacy for the curriculum (Mimicry with US and UK programmes).

Whereas these policy genre texts are produced to change funding and regulatory influences on the degree development processes, reflective purposive genre texts are produced to reflect on the processes. These reflective purposive texts are discussed in the following section.

5.6.6 Reflective Purposive Genres

Reflective purposive discourses are texts produced purposively to reflect on the actions involved with the unique nature of the process. They are produced at the end of each of the Phases. Two of the texts (Documents #24, 3) are explicitly produced by collaborations that included the federal government to provide rational (theoretical) and moral evaluative legitimization of the process.

In 1994, the reflective purposive genre produced was Document #12: *A Whole New Way: The Development and Start-up of the Eaton School of Retailing*. The following exemplar from the Eaton Legacy shows the purpose of Document #12.

“The main outcome of the Eaton Vision 2000 committee was a **written report entitled “A Whole New Way”, which detailed the work done** to date in the development of the ESR, plans for its future growth and development, and its potential role within the industry.”...Document #3, p. 87

The Whole New Way produced particular forms of IW Mimicking (i.e. C:M) and Defining (i.e. C:D) work, which provide rationalisation-theorising legitimization. This document provides evidence of Mimicry work (i.e. C:M) because it includes a

complete list of the “*Benchmarks of Best Practice in Corporate Education: Organizations Consulted*” (Document #12, pp. 43-47).

The Defining work is illustrated in the Action Plan developed in *The Whole New Way* which is based on four distinct Phases of development (Document #12, pp. 14 and 36, 37). Phase One includes the delivery of two pilot course offerings and this document was produced at the end of this Phase. Phase Two would include the introduction and ongoing development of the courses and programme for the ESR. Phase Three would include expanding the programme to the broader retail sector and Phase Four would provide for public access to the programming. The definition of the Phases includes specific descriptions of activities, dates and collaborations needed for the development of the programme. The analysis of this Defining work provides evidence that the temporal patterns of the process are determined by actors within the process. In addition, there is evidence that the Defining work contributed to the constitution of the collaborations necessary to advance the process and provided rationalisation-instrumental legitimation.

In 1997, Document #24: *Canadian Retail Management Education Program – partnership brochure* was produced, and it utilised rationalisation-theorisation legitimation. Its purpose is described in this quote from *The Eaton Legacy*.

“Ryerson and Eaton’s believed it was important to document the progress of the School so that other faculties at Ryerson and possibly outside institutions, both corporate and academic, could learn from their experience. They draw attention to the ingredients of a corporate-university partnership in a small booklet which listed the following key success factors:

- Committing to a common vision
- Knowing and understanding each other
- Combining individual strengths
- Trust

- Working productively together
- Innovation
- Learning together.
- Building new networks
- Equal and shared benefits for each partner
- Continuous quality improvement
- Creating new knowledge.”...Document #3, p. 32

The third reflective purposive Document #3: *The Eaton Legacy: Reinventing Retail*

Education was produced in 1999. These exemplars show the purpose of this reflective-purposive text.

“Another aspect of the NSAS initiative was “Documenting the Process”, which **recorded the development of the ESR and its growth into the CRMEP in a written format for publication, either in print or electronically.** The NSAS Committee felt that such a record would serve as **an important learning tool** or model for other organizations wishing to pursue similar initiatives in corporate education.”...Document #3, p. 49.

“The key is to be able **to extract the essential ingredients from the model, what really made it work, and articulate them clearly.** The model in my mind is that of the university and its customers creating a new relationship in which the producer, supplier and the user become partners in all of the process...With chapters on such topics as curriculum development, academic-corporate partnerships, funding, and evaluating corporate learning, the document was designed to be a learning model or tool for other organizations and individuals. From the outset, it was **intended to be a readable text, with quotes and anecdotes, that would appeal to as wide an audience as possible.**”
...Document #3, p.59

These reflective-purposive texts display a distinct pattern in the timing of their production and in the nature of their producers. They are produced at the end of each Phase of the process, thereby providing punctuation between phases.

Furthermore, the temporal Phases and processes are created by the producers for the purposes of development process.

In summary, the texts constitute a variety of genres that perform multiple forms of IW and utilise multiple legitimating strategies. Marketing genres are concentrated in the

third phase of the process and utilise Defining forms of IW to rationally legitimise and provide concise, coherent information to potential students. They also serve to Educate and Construct retail management's career identity (C:CI). Technical genres are produced in Phases Two and Three and provide expert legitimisation of the process. Field genres are distributed to multiple communities and perform IW in Constructing Normative Networks (C:CNN) and Identities (C:I). Popular genres are most evident in Phase One and set the stage in the public domain by rationalising the threats that presage the need for the degree. Policy genres are most evident in the second Phase of the process when the funding and approval processes occurred. Many constitute Advocacy (C:A) , Vesting (C:V), and Defining (C:D) IW and also constitute multiple forms of IW which provide expert authoritative legitimisation. Finally, this data shows a particular form of textual genres, Reflective Purposive genres, which are explicitly produced to reflect on the degree development process, to provide theoretical rational and moral evaluative legitimisation, and to punctuate the phases of the process.

After categorising and analysing the texts according to genres, the analysis examines how the three pillars of institutions are constituted through the data. This analysis is discussed in the following section.

5.7 Analysis of Patterns of Institutionalised Dimensions

The time frame for this analysis is from 1993 to 1998 which is the time when the new university degree is instantiated – i.e., when the new institutional element becomes practice (Langley et al., 2013). At that time, the dimensions of the new institution have also been instantiated. These dimensions mutually constitute IW discursive

actions throughout the process. Table 5.13 shows the constituting IW actions for each of the pillars. The sections following the Table then examine the patterns in the constitutions of these dimensions.

Table 5.13 IW Actions Constituting Institutional Pillars (Source: Developed for this study)

Institutional Dimension	Guide IW Action Through:	Constituting IW Actions include:	Constituting Actions in this Study include:
Regulative	Establishing and enforcing rules to regulate behaviour	Creating: Advocacy Creating: Defining Creating: Vesting	<ul style="list-style-type: none"> Advocating for funding for degree development process Defining government requirements for university funding, and degree granting, including university's existing and emergent degree granting procedures and requirements. Vesting funding for process
Normative	Norms that prescribe, evaluate, and oblige behaviour	Creating: Constructing Identities	<ul style="list-style-type: none"> Constructing professional identity for retail management careers
		Creating: Changing Normative Associations (C:CNA) about need for Distance education Corporate University Innovative Curriculum	<ul style="list-style-type: none"> Creating normative association for process integrating interorganisational collaborations, innovative curriculum content and delivery in the process including: <ul style="list-style-type: none"> a) Distance education delivery b) Corporate-university partnerships c) Innovative curriculum development processes
		Creating: Constructing Normative Networks(C:CNN)	<ul style="list-style-type: none"> Constructing interorganisational collaborative networks
		Creating: Theorising (C:T)	<ul style="list-style-type: none"> Theorising about normative degree development processes
		Creating: Mimicry (C:M)	<ul style="list-style-type: none"> Mimicking US and UK programs/processes
		Creating: Educating (C:E)	<ul style="list-style-type: none"> Educating about development process and mechanisms
Cultural/ Cognitive	Categories creating shared conceptions for framing how meaning is made	Creating: Theorising about corporate professionalisation including: <ul style="list-style-type: none"> a) retail management jurisdictional claims (C:TPJC) 	Theorising retail management as a corporate professional occupation including: <ul style="list-style-type: none"> a) a specific occupational jurisdiction (retail management as a career),
		b) retail management body of knowledge (C:TPBOK)	b) a specific body of retail management knowledge (Research Chair, industry needs, and program, degree and course content and benefits)
		c) retail management educational requirements (C:TPEP)	c) specific educational requirements (occupational standards, certificate, degree requirements).
		Maintaining: Enabling (M:E) and Demonising (M:VDT0)	<ul style="list-style-type: none"> Enabling Eaton's viability Demonising US/global retailers' threat
		Disrupting: Disassociating moral foundations (D:DMF)	<ul style="list-style-type: none"> Disassociating from negative portrayals of retail management as a career

5.7.1 Patterns in Regulative Institutional Dimensions

Regulative institutional dimensions relate to the government requirements for funding and degree-granting, and include degree-granting requirements. These dimensions are constituted by IW Advocating for funding, Defining programme requirements, and Vesting of funding for the process. There are temporal and convergent patterns in the ways these actions build Regulative institutional dimensions.

IW actions oriented to building the Regulative dimensions of the process are evident from 1996 to 1999, i.e. from the middle of the Formation Phase through to the end of the process.

Regulative dimensions are predominantly constituted through policy genre documents (see Section 5.6.5). These documents perform multiple IW and consequently simultaneously constitute Cultural-Cognitive institutional dimensions. For example, Documents #4 and 41 relate to the *Structure of Demand and Societal Need for Retail Education* and both perform Advocacy IW because these policy reports contribute to funding and credentialing processes. They also perform IW by Theorising about collaborative degree programme development processes and about the professional nature of Canadian retail management careers, including the need for university-level retail management education. As a result, Regulative dimensions and Cultural-Cognitive dimensions are both constituted through the discursive work performed by these policy texts.

Another example of converging dimensions is how the process of Defining the requirements of the certificates and degree also constitutes the specific body of retail management knowledge which heretofore has not been defined (see Table 5.12). As Advocating work is oriented to securing funding for developing the required research/documentation for degree approval, the related process is oriented to developing specific educational requirements for retail management practitioners. Therefore, these Regulative dimensions converge with Cultural-cognitive dimensions related to professionalising retail management as a career.

Whereas Regulative dimensions substantiate the rules and regulations related to institutionalisation of the degree development process, normative dimensions provide norms about this process. The analysis of the patterns of these normative dimensions is discussed in the following section.

5.7.2 Patterns in Normative Institutional Dimensions

In this study, Normative institutional dimensions include the norms that characterise this collaborative, innovative degree development process. Specifically, multiple IW actions constitute these norms, including constructing retail management's career identity (C:CI), changing normative associations about the process (C:CNA), constructing interorganisational collaborative networks (C:CNN), theorising about the process (C:T), mimicking US and UK programmes (C:M) and educating about the process (C:E). The analysis shows that there are temporal and convergent patterns in the ways these actions build Normative institutional dimensions.

Normative dimensions are constituted throughout the process. IW begins in 1993 with the inception of the ESR contract (Document #84), thereby setting the stage for the high level of involvement in the collaborations (i.e. C:CNN) that characterise the entire process. There is also evidence of multiple forms of IW actions constituting Normative dimensions, as illustrated in the bolded IW actions in this exemplar from *Getting the Most out of Learning: A Qualitative Evaluation of the Eaton School of Retailing*.

“Curriculum for the ESR was developed through a comprehensive process of evaluation and consultation that included the following dimensions.

- Objectives and contents of the program were based on a detailed needs assessment that involved over 300 Eatonians. During 1996, approximately 600 members of six retailing companies were also surveyed as part of the information base for program development. **(C:T)**
- A benchmarking process undertaken between 1993 and 1996 gathered the best practices in corporate education in North America and Europe from some of the most interesting and innovative corporate education enterprises in the world, including Motorola, General Electric, IBM, Andersen consulting, Disney, CIBC, AT&T, Harrods and Marks and Spencer. **(C:M)**
- University-based retail management programs world-wide were reviewed for philosophy, scope, contents and approach. **(C:M)**
- A sectoral advisory committee has provided advice and support.” **(C:CNN)**...Document #44, p.1

In addition, as discussed in Section 5.6.6, reflective-purposeful genres of texts are produced at the end of each Phase in the process, thereby constituting norms for the elements of each Phase and of the process as a whole.

Specific discursive IW related to the value and legitimacy of corporate universities is evident throughout the process, as illustrated in this quote from *Getting the Most out of Learning: A Qualitative Evaluation of the Eaton School of Retailing*.

“The Eaton’s/Ryerson alliance is unique in North America, both in its purposes and its approach to the corporate/university partnership. It stands, in fact, as a **whole new model of collaboration that changes the way a university**

carries out its business and that business invests in individual and corporate learning.”...Document #44, p.6

The discursive constitution of normative dimensions is evident in field genres distributed to the academic community, including one produced by AACSB (Document #77) (see Section 5.6.3), and culminating in Meister's (1999) discussion of the ESR partnership in her book *Corporate Universities: Lessons in Building a World-Class Work Force*. These discursive IW actions constitute a Normative dimension for corporate universities' role in the process.

In 1996, the process was presented with two awards (Documents #73 and 82) for the nature of the partnerships and the development process (see Section 5.6.3), thereby constituting norms about collaborative and sector-specific degree development processes.

Beginning in 1996, the discourses constituting Normative dimensions simultaneously constitute Regulative dimensions. For example, *The Whole New Way* (Document #12) presented a list of the benchmarking activities which provided normative information for the development process. This list was included in Document #5, *Retail Management Education: A Review of Current Undergraduate Programs*. Document #5 was then included in Document #47, *Report on the Industrial Adjustment Services Initiative in Retail Management Education*, which recommended the development of Document #48, *Proposal to Department/School Councils for an Undergraduate Degree in Retail Management*. Documents #47 and 48 both constitute Regulative dimensions of the process by Defining course and programme requirements.

In addition, the discourses constituting Normative dimensions simultaneously constitute Cultural-Cognitive dimensions. For example field genre texts (i.e. Documents #74) constitute norms about innovative degree delivery processes, which converge with Cultural-Cognitive dimensions about a specific retail management body of knowledge.

Whereas the constitution of normative dimensions substantiates the norms about this innovative degree development process, the constitution of cultural-cognitive dimensions is related to the professionalisation of retail management as a career. In particular, this discursive process relates to how a retail management degree provides a professionalising influence. The analysis of patterns in the discursive constitution of these cultural-cognitive dimensions is discussed in the following section.

5.7.3 Patterns in Cultural-Cognitive Institutional Dimensions

In this study, Cultural-Cognitive institutional dimensions include theorising about how the degree development process professionalises retail management. This includes the jurisdictional claims particular to retail management as a career, a distinct body of retail management knowledge, and specific retail management educational requirements. Related IW actions include theorising (i.e. C:TPCJ, C:TPBOK, C:TPEP), enabling (M:E), demonising (M:VDT0) and disassociating moral foundations (D:DMF). There are patterns in the constitution of these Cultural-Cognitive dimensions and, as explained in Sections 5.7.1 and 5.7.2, there are also

convergent patterns in the ways these actions constitute Cultural-Cognitive institutional dimensions.

Throughout the process, there is evidence of discursive IW actions establishing jurisdictional claims about retail management as a professional career. An example is found in an article in an internal Ryerson newspaper.

“The Retail Management degree will prepare students for **professional careers** in the retail sector.”...Document #17, p. 1

These discourses establishing retail management’s jurisdictional claims are also exemplified in the multiple *Retailing as a Career* field genres (see Section 5.6.3) and in the educational marketing materials produced by the RCC (Document #19) (see Section 5.6.1), thereby constituting a Cultural-Cognitive institutionalising dimension for the process.

In the process of establishing jurisdictional claims about the professional nature of retail management as a career, discursive IW actions (D:DMF) are also directed at discrediting the notion that “In Canada retailing is not considered a professional career.”(Document #54, p. 1), which is a quote from the RCC’s report titled *The Accidental Career: a Report on Careers in Retailing: How to Make Retailing a Career of Choice*. These claims thereby establish jurisdictional occupational boundaries for Canadian retail management.

Discursive IW actions constituted a Cultural-Cognitive dimension by claiming that this degree development process develops a specific body of retail management knowledge and therefore provides a frame for the meaning of professional retail

management. The following exemplar from a trade publication illustrates this dimension.

“This is a Canadian first-a university-level **professional** program designed from the ground up for retail management. Its aim is to **improve the knowledge base** and competitiveness of retailers and their partners for fostering world-class standards of service excellence and competitive performance.”...Document #75

Furthermore, the following quote from the interview with the CE Director illustrates how the specific retail management knowledge base validates the nature of retail management as a career choice.

“there were two very important contributions that I thought the project made. One was to actually **organize the knowledge base for retailing** which hadn't really been done before and that was a huge team effort from the industry and a whole bunch of people in the academic community. I think the other was in fact the **validation of the career choice**.”...Lines 245-250

In addition, discourses related to the Eaton Chair in Retailing (Documents 9, 16, 56, 92, 97, 98, 99, and 101) are distributed to all of the constituent communities (i.e. general public, and Ryerson, government, retail, and academic communities) to establish that there is a specific retail management body of knowledge. The purpose of the Research Chair is described in this quote from *The Eaton Chair in Retailing* brochure

“The **objective of the Chair** is to strengthen the competitive position of the Canadian retail sector in the global economy through **industry-based research, the dissemination of strategic information, and the linking of current retail research to Canadian-based retail education and training programs**.”
...Document #9, p.1

The discursive themes that focus on establishing specific educational requirements, also frame the meaning about what those requirements are for retail management. For example, one of the policy texts produced during the ESR development process was a report on *Occupational Standards: Delivering retail Professionalism - A Report on Occupational Standards for the positions of: Retail*

Sales Associate, Retail First Level Manager. As shown in the following exemplar, this policy text established specific educational requirements for developing the professionalism of retail management.

“The completion of the occupational standards now provides Canada with the tools **to enhance retail professionalism.**”...Document#43, p.1

In summary, the discursive IW actions evident throughout the data, show how Regulative, Normative, and Cultural-Cognitive institutional dimensions are constituted throughout the degree development process. There are patterns in the simultaneous constitution of the three dimensions and in their temporal development. In particular, IW constituting Regulative dimensions is particularly evident in the latter half of the process and there is punctuating IW that constitutes Normative dimensions at the end of each of the three Phases of the process. Cultural-Cognitive dimensions frame how the degree development process professionalises retail management as a career, thereby legitimating the need for a Canadian retail management degree.

After categorising and analysing how the three pillars of institutions are constituted through the data, the analysis examines patterns in the relationships between the actors, the discursive institutional work they perform, and the institutional elements that constitute the development process. The resulting patterns are discussed in the following section.

5.8 Patterns in Relationships between Actors, Discursive Institutional Work and Institutional Dimensions

Membership in the collaborations is mutually constituted by the discursive institutional work (DIW) the collaborations perform. For example, the IAS Initiative published the

Proposal for Creation of NSAS Committee (Document #50), which prompts the formation of the National Sector Adjustment Services Committee for Career Awareness and Technology-Enhanced Learning in Retailing & Occupational Skill standards and Certification (NSAS) collaboration. As a result, temporal patterns in the formation of the interorganisational collaborations are also related to the relationships between collaborations and the DIW they performed.

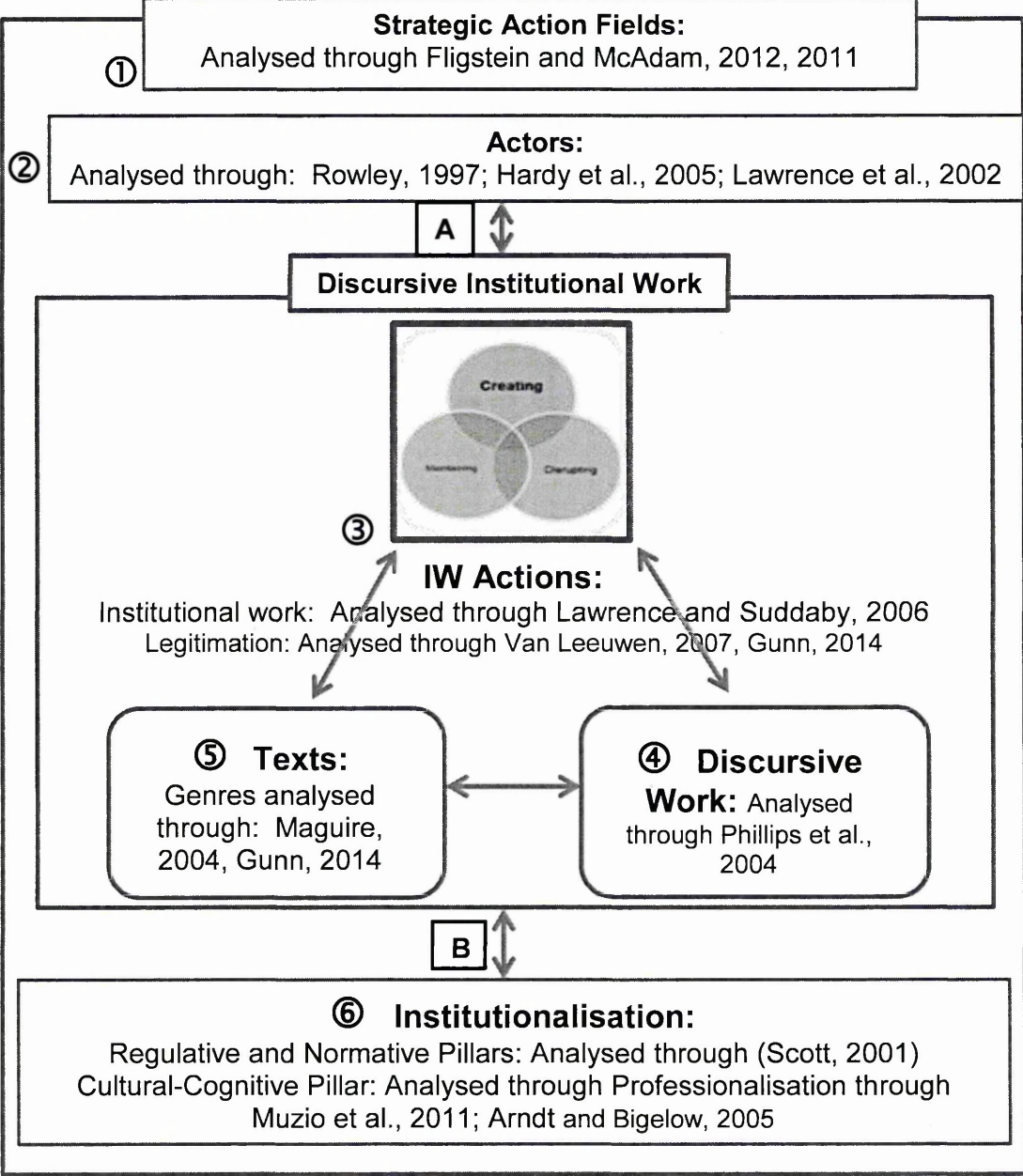
The analysis also shows that there is a mutually constitutive relationship between DIW and the resulting institutional dimensions. For example, as Normative institutional dimensions (characteristics of US/UK degree programmes) are established, they trigger needs for more DIW to be performed to constitute Regulative institutional dimensions (degree completion requirements).

The patterns and evidence produced throughout this analysis constitute an analytic model that guides the explanations of the data. The model is described in the following section.

5.9 Explanatory Analytic Model

The analytic model (Figure 5.2) depicts the operationalisation of the data analysis process and the specific progression of the process through the descriptive and classification analyses. This explanatory model (Figure 5.2) is produced in Stage 4 of the analysis, when the sets of data from Stage 3 are merged for the purpose of cross-analysis.

Figure 5.2 Explanatory DIW Analytic Model (Source: Developed for this study)



This model portrays the dimensions of the institutionalisation process that are evident in this study and relates them to the a priori models that informed the approach. The investigation begins with #① which is the analysis of the characteristics of strategic action fields, based on the dimensions of Fligstein and McAdam’s (2012, 2011) model.

The model then depicts #②, which is the analysis of the actors and which utilises Rowleys' (1997) identification of the characteristics of centralised individual actors as well as dimensions of Hardy et al.'s (2005) and Lawrence et al.'s (2002) models to analyse the characteristics of interorganisational collaborations.

Evidence of discourses is then analysed. In #③ of the model, IW discursive actions are analysed to produce evidence of discursive themes utilising Lawrence and Suddaby's (2006) categories of IW and Van Leeuwen's (2007) model of legitimisation strategies. The analysis also produced an additional dimension of legitimisation strategies (Gunn, 2014). The resulting discursive themes are used in part #④ to analyse patterns of discursive work, utilising dimensions of Phillips et al.'s (2004) model. The genres of texts are then analysed in part #⑤ of the model, which utilises definitions from Maguire's (2004) model. The analysis also produced two additional genres of texts which were evident in the data (Gunn, 2014).

The model depicts the constituting institutionalisation in part #⑥ of the model, through the analysis of three dimensions of institutions based on Scott's (2001) definitions. Furthermore, the analysis of the constitution of the cultural-cognitive dimensions also refers to Muzio et al.'s (2011) and Arndt and Bigelow's (2005) operationalisation of dimensions of professionalisation.

The mutually constitutive nature of the relationships between collaborations and DIW is represented by the bidirectional arrows labelled **A**. In addition, the mutually

constitutive nature of the relationships between DIW and the institutional dimensions produced is represented by the bidirectional arrows labelled **B**. Finally, the recursive nature of IW work performed, the discursive work, and the text genres is also portrayed by bidirectional arrows between the three elements of Discursive Institutional Work.

Throughout the model, the analysis includes temporal analysis of the data. Anomalies in the data are noted and provide inspiration for investigation of dimensions for which the a priori models do not account.

This model and the data displays provide the basis for making connections about the dimensions of discursive institutional work, including relationships between the formation and characterisation of strategic action fields and their constituting actors (text producers). The patterns in the discursive relationships between the IW actions, discursive work, and genres of texts provide the basis for making interpretations about the institutional influences of discourses. This model provides a way to connect the influences of the nature of the field, the constituting actors and their discursive work, with the resulting institutional dimensions. This explanatory model therefore helps to organise the findings of the analysis by portraying possible causal relationships. The resulting discursive institutional work constitutes the institutionalisation of an innovative degree development practice.

5. 9 Chapter Five Summary

The systematic data analysis process is applied to the case data and produces an analytic model that organises the results. The results show the nature of the strategic

action field and the constitutive, collaborative actors involved with the degree development process. They produce, distribute and consume discourses that are constituted by institutional work actions, discursive work, and texts. The discursive work legitimates the innovative, collaborative development of a retail management degree programme for the purposes of professionalising the career. Exemplars from the data are also presented, providing vivid details about the case processes, actors, texts, and discourses (Creswell & Miller, 2000). The analysis of this study includes multiple, focused discursive examples of the patterns and themes in the data, and data displays that summarise the analysis results. The analysis process and results provide a firm foundation for Chapter Six, which provides a discussion of insights about the innovative institutionalising processes evident in the case.

Chapter 6: Discussion of Findings

6.1 Introduction

Chapter Five provides the analysis of the data presented in the ESR case study. The purpose of Chapter Six is to discuss the findings of the analysis in relation to the purpose of this study and the resulting research question.

“How do discursive processes institutionalise an innovative practice of retail management degree development?”

In order to answer the research question, this study has generated a number of objectives and this Chapter presents a discussion of the extent to which these objectives are fulfilled through the analysis presented in Chapter Five.

The Chapter begins with a discussion of the results that contribute to accomplishing the first research objective. The second section provides a discussion of the findings that accomplish the second objective and then the discussion in the third section provides an explanation of how the third research objective is accomplished. The Chapter culminates with a summary of the findings about relationships between different types of collaborations, discursive institutional work, and institutional elements within the specific context of a strategic action field.

The following section provides a discussion of the findings that present a process theoretical explanation for discursive institutionalisation and, that thereby satisfy the first research objective.

6.2 Research Objective #1:

The first objective is to provide evidence of the conditions in which a discursive model of institutionalisation applies, in order to produce an explanatory model.

Correspondingly, this objective is:

Develop a discursive model of institutionalisation processes by specifying the conditions in which it may provide explanations.

According to Pentland (1999), process theoretical explanations require abstract conceptual models that identify the generative mechanisms at work and explain the relationships between events in a process. The process explanation should include a) a sequential structure, b) focal actors, c) a point of view, d) an evaluative frame of reference and e) indicators of content and context (Pentland, 1999). The analysis in Chapter Five shows evidence of each of these characteristics and, therefore, it also establishes a process theory of discursive institutionalisation. The findings about each of these characteristics are now discussed.

a) A Sequential Structure: The discussion about how this analysis exhibits the characteristics of a process theory begins by distinguishing the sequential nature of the discursive institutional work framework. This discussion includes temporal patterns and recursive interactions evident in the process.

This analysis establishes that this process theory of institutionalisation features a sequence in discursive collaborative dimensions. The discursive model of collaboration processes developed by Lawrence et al. (1999) presents a way to view how collaborations form by importing concepts and objects from the organisational

field in which the members are located, negotiating dynamics of the relationships related to issues, interests and representation, and producing outcomes (i.e. concepts, objects and actions), which consequently affect the organisational field. Likewise, this process explanation follows a sequence by which collaborations are formed within a strategic action field to perform discursive institutional work. This work is purposively performed to produce institutional dimensions, which consequently affect the formation of collaborations and more DIW.

However, this explanation also shows how a process is delineated by temporal patterns discursively produced and synchronised within the process. The structure of a discursive institutionalising process is related to temporal patterns which are simultaneously manifested as transactions and as social constructions of the actors participating in the process (Van de Ven and Poole, 2005). In other words, the process is comprised of transactions (i.e. discursive actions and events), which represent progress in the institutionalisation process and these transactions have been constructed by the participants in the process, for the purposes of the process. These transactions are discursively constructed in the form of plans, proposals, schedules, and reports and, therefore shape the progress of development processes (Orlikowski and Yates, 2002).

Furthermore, the structures of these discursive transactions are not static; they are emergent and flexible according to the particularised ties and the levels of involvement and embeddedness of the various collaborations. When collaborations are formed, they define their identity, purpose, roles and interdependency (see Section 5.3). The interdependence of these collaborations is characterised by high

levels of involvement and embeddedness (Lawrence et al., 2002). As a result of the IW involved with forming these interdependent ties, these collaborations also discursively determine the temporal structuring of the discursive actions they will perform. This discursive structuring is evident in plans, project timelines, punctuating texts (i.e. texts produced for the purpose of concluding and summarising a Phase) and the recursive, synchronised way that texts are produced to build upon each other.

In addition, the collaborations' membership is temporally determined by the actors' determination of the purposeful DIW required. These actors determine when and for how long collaborations are required according to specific discursive purposes (see Section 5.3). These purposes include the development, synchronisation and reiteration of specific discursive themes. They also include purposive actions about the nature of the legitimation provided by the themes, and the production of specific genres of texts.

The sequence of the process is also established by discursive punctuations. These punctuations occur in the form of reflective-purposive genres of texts, which summarise progress, present legitimating strategies, plan further DIW, and conceptualise the transactions which constitute the temporal sequencing of the process.

The relationship between changes in collaborations' memberships and their DIW actions is recursive in nature. Previous studies of interorganisational collaborations have found that changes in membership are related to exogenous and endogenous pressures (Seitanidi and Crane, 2009; Huxham and Vengen, 2000). However this

analysis shows that there is a recursive, synchronised relationship between membership and DIW actions. The collaborations' membership is determined by the DIW actions required to advance the process and the DIW actions are determined by the members of collaborations.

Furthermore, DIW actions and the institutional dimensions they produce are also mutually constitutive, and recursive in nature. In response to calls for research examining the dynamics of the temporal complexities in innovative processes (Garud et al., 2013; Garud and Karnoe, 2001), this analysis shows that the interplay between these facets of the model is purposive and synchronised. Therefore the sequential structure of the relationships between the institutionalising elements in this process theory is not only purposively recursive, but also synchronised.

As this study shows that the relationships between this study's DIW model dimensions are recursive, it presents an alternate explanation of discursive institutionalisation than the sequential conceptualisation presented in Phillips et al.'s (2004) discursive model of institutionalisation. For example, the current study's actors produce discursive work (i.e. reports) that define regulative dimensions of the degree, which enable the actors to produce more discursive work (i.e. marketing materials), which thereby constitute cognitive-cultural dimensions of the degree and so on. Furthermore, specific DIW actions (i.e. mimicry) produce Normative institutional dimensions, which thereby contribute to the development of Regulative dimensions requiring further DIW actions.

This analysis also establishes the focal roles of actors who are instrumental throughout the institutionalisation process and the following discussion presents how these roles are important to this process theory.

b) Focal Actors: The analysis shows that when institutionalised and corporate embedded actors form purposeful institutionalising collaborations situated in emerging strategic action fields, they work as protagonists. Whereas institutional studies situated in social movement fields have focused on the antagonistic nature of collaborations (Zietsma and McKnight, 2009), this analysis illustrates the characteristics of protagonist relationships.

These actors form multiple collaborations for multiple discursive purposes. The reasons for their collaborations are linked to legitimate, generalised identity ties, and each of the collaborations develop particularised discursive ties about interdependence, authority and roles (see Section 5.3.1). This pattern is in keeping with findings of previous studies of collaborations that the production of collaborative relationships is a discursive accomplishment (Hardy et al., 2005; Lawrence et al., 1999).

The process of institutionalisation analysed in this case, also features collaborative actors comprised of diverse members from institutionalised and fragmented fields. This particular membership composition provides multiple forms of legitimation for the collaborations' DIW actions. The institutional members provide authoritative legitimation (Phillips et al., 2000) and the embedded corporate actors provide rational-instrumental legitimation.

This analysis also demonstrates how this DIW model presents a particular point of view about institutionalisation processes. This perspective is discussed in the following section.

c) A point of view: The point of view presented in this process is a collaborative one. It establishes the perspective that institutionalising processes affecting the boundaries of fragmented fields involve institutionalised and embedded corporate actors. Furthermore, the processes are established through discursive actions produced by these collaborations and distributed to the diverse communities the members represent and connect with through their networks.

The analysis also shows that discursive actions are structured so that the institutional and embedded corporate actors produce synchronised, consistent messages. For example, DIW themes are coherent, supported by broader discourses, counter competing discourses, and are therefore likely to produce institutionalising processes (Phillips et al., 2004). These collaborative and cohesive discursive actions also establish the value of the development of institutionalised elements, by substantiating the bases of the legitimacy of these elements to the field (Slager et al., 2012; Perkmann and Spicer, 2008; Garud et al., 2002).

This point of view also purports that discursive legitimization through professionalisation is central to processes involved with occupational boundary work (Muzio et al., 2011; Zietsma and Lawrence, 2010). In particular, this view establishes that discursive professionalisation processes are manifested in Cultural-cognitive

institutional dimensions of occupations. These dimensions are also recursive with Regulative and Normative institutional dimensions.

In addition, this common, mutual voice recognises that norms related to a field's boundaries survive despite the viability of individual organisations. Previous studies of institutionalisation have provided insights into the role of institutional entrepreneurs (Leca et al., 2008; Greenwood and Suddaby, 2006), in mobilising resources and actors (Garud et al., 2007; Perkmann and Spicer, 2007). This analysis illuminates the specific discursive work performed by and with institutional entrepreneurs in mobilising interorganisational collaborations. In particular, it provides evidence that discursive collaborations between corporate, embedded actors with institutionalised partners are central to institutionalisation processes. The development of institutional elements through collaborations with institutionalised partners provides a way for embedded corporate actors in fragmented fields to affect issues at the field level, regardless of the actors' status (Gray and Hay, 1986) and corporate viability.

This analysis also demonstrates that this model presents an evaluative frame of reference. The following discussion focuses on how this DIW framework provides an evaluative frame of reference about the appropriateness of a discursive process of institutionalisation.

d) *Evaluative frame of reference*: This analysis explains that the dimensions of the DIW model provide a way to understand constituent elements of institutional processes. The theoretical framework developed in Chapter Two asserts that institutionalisation of a new practice occurs through discursive processes. These

processes constitute change in an institutional practice and this theoretical framework presents explanations of the elements and relationships that constitute the processes.

In particular, the analysis establishes that the genesis of an innovative institutional practice is generated through discursive work that establishes the legitimization of corporate involvement with institutional processes. The analysis shows how the characteristics of the discourses produced, distributed, and consumed by the actors in the strategic action field constitute the pillars that form an innovative institutional practice.

This analysis shows that innovation is a collaborative effort that centres on the development of relationships between discursive elements produced by actors who are committed to carrying mutually generalised issues through to a legitimate and institutionalised state. In *The Innovation Journey*, Van de Ven et al. (1999) show how innovations involve the development of relationships through collective action. However, through the analysis of the recursive nature of the elements in this framework, this analysis shows how the development of relationships amongst discursive elements is also involved in innovation processes.

Finally, this analysis exhibits indicators of content and context that provide information central to the understanding of this framework of institutionalising processes.

e) Indicators of Content and Context

This theoretical model involves four major elements: strategic action fields, actors, discursive institutional work, and institutional dimensions. Constituting relationships

occur between the characteristics of a strategic action field and its constituent actors, between these actors and the discursive institutional work they produce, and between these discursive institutional work processes and the development of institutional dimensions.

The premise of the theoretical framework developed in Chapter Two is that the emergent strategic action field is discerned by the identification of the three mechanisms described in Fligstein and McAdam's (2012, 2011) explanation of strategic action fields. The first mechanism is mutual identification of threats by diverse actors. These threats can originate with both endogenous and exogenous sources. The second mechanism is that the constituting actors have access to multiple resources, with which they operationalise innovative actions, which is the third mechanism involved with the development of these fields.

Central to this process explanation is the structuration of the strategic action field that defines how common understandings of institutional innovation occur. DiMaggio and Powell (1983) describe how this process of structuration has four parts: 1) increased interaction between organisations in a field, 2) defined structures of hierarchy and patterns of coalition, 3) increased information loads, and 4) mutual awareness of common purpose. In this study, multiple organisations interact for the first time in multiple collaborations. These collaborations have defined structures of generalised and particularised identity ties, involvement and embeddedness. Through these involvement and embeddedness structures, they experience increased information loads, and their common purpose is communicated in the discursive themes and texts produced throughout the process. This analysis, therefore, illuminates how these

elements of structuration occur in an emerging field, one where actors have not previously identified with each other or with a common purpose, and one where institutionalised and corporate actors from a fragmented sector come together.

In addition, the analytical framework developed through the analysis presented in Chapter Five establishes that discursive institutional work includes three sub-dimensions of institutional work actions, discursive work themes, and genres of text production and distribution.

This analysis also demonstrates that the nature of the collaborations, the discursive work, and the resulting institutionalised process are recursive. For example, the membership in the collaborations is shaped by the type of discursive work that is required to institutionalise the process, and the type of discursive work is likewise shaped by membership in the collaboration. The analysis therefore provides evidence that interorganisational collaborations constitute discursive work, and thereby constitute institutionalisation of a new practice.

This study focuses on the discursive work associated with the innovative development of an institution, with the specific purpose of altering a career identity, and it shows that meso-level actors engage in purposive institutional work. The analysis shows that the purposive work involves multiple and converging types of DIW. For example, in the process of creating a new degree, the actors are simultaneously maintaining the integrity of existing degree development requirements and disrupting prevailing mechanisms and perceptions.

Previous research provides discursive institutional models that delineate the dimensions framing how institutionalism is constituted by discourse (Phillips et al., 2004). For example, Phillips et al.'s (2004) discursive model of institutionalisation determines that the nature of discourses, the actors that produce them and the texts in which they appear affect institutionalisation. Likewise, this analysis shows evidence that actors' purposive actions manifest institutional development through genres of texts and their constituent discourses.

Whereas, this analysis shows evidence of the theoretisation of a process of institutionalisation, it also provides an empirical investigation. The following section presents a discussion of the analysis of the empirical investigation.

6.3 Research Objective #2:

The analysis shows evidence of the particular characteristics of this empirical study of innovative institutionalisation process, and thereby accomplishes the second objective of this study.

Investigate a collaborative practice of undergraduate degree development in an emergent strategic action field, which constitutes an innovative institutionalisation process.

These results provide an empirical example of specific conditions in which the DIW analytical model provides explanations and from which theoretical generalisations are drawn. In particular, this analysis operationalises the DIW conceptual framework developed in Chapter Two, in a meso-level analysis of the development of an innovative degree development practice. This analysis is thereby set in a strategic action field and shows that multiple interorganisational collaborations used multiple

discursive processes to legitimate innovative degree development processes.

Specifically, the analysis of this case study shows how a private, consumer service corporation, a public university, government bodies, and other actors in a strategic action field co-developed a degree through discursive work with the expressed, common purpose of making the Canadian retail management occupation more professional.

This study also demonstrates particular characteristics of an innovative degree development process. In particular, it exhibits characteristics of four dimensions of the discursive model of institutionalisation: a) the emergent strategic field in which the development process was situated, b) the multiple actors who participated in the process, c) the discursive institutional work they performed and d) the institutional dimensions which were constituted through the process. The analysis of these four dimensions is now discussed.

a) Characteristics of an Emergent Strategic Action Field: This analysis shows evidence of the influences that shape the formation of a strategic action field for the purpose of discursively institutionalising a new practice. These findings show how diverse actors from diverse extant fields came together to form a strategic action field. The strategic action field in this case is the Canadian retail management education field.

According to Fligstein and McAdam's (2012, 2011) model of mechanisms that mobilise the formation of strategic action fields, the three main mechanisms are the identification of threats by actors, the actors' ability to access mobilising resources,

and the implementation of innovative actions by the actors in response to the threats. This analysis shows evidence of the three mechanisms that influenced the formation of this field.

The first mechanism is the mutual identification of threats, and this analysis provides support for the notion that heterogeneous actors have the ability to mutually identify disparate influences as justifying the mobilisation of collaborative action. This analysis finds that actors from non-fragmented, institutionalised fields like universities and governments came together with embedded actors from a fragmented, corporate field to form the retail management education field. Further, it finds that these diverse actors mutually identified threats from US/global retailers, a dearth of education, declining university funding, Eaton's viability and potential demise, and negative perceptions about retail management as a career.

As illustrated in Table 5.1 (see Section 5.2), these threats were simultaneously exogenous and endogenous in nature. Multiple and convergent, endogenous and exogenous influences thereby precipitated the development of a strategic action field. Even when endogenous influences were focused on a single actor in the field (i.e. Eaton's threatened viability in the Canadian retail field), they were also perceived as relevant changes that warranted forming a collaborative strategic action field.

Whereas previous studies of influences have identified how a major threat can instigate field development (Van Wijk et al., 2013; Trank and Rynes, 2003), this analysis shows how multiple, convergent influences contribute to field formation by galvanising generalised ties to the field's purpose and to the constituting

collaborations. This mobilisation has been previously attributed to bricolage processes (Garud and Karnoe, 2003), where diverse actors utilise existing resources and improvisation to develop novel solutions. However, this analysis shows that although diverse actors from multiple domains utilised existing resources, they shared a common motivation to respond to perceived threats, which was explicitly framed in generalised discursive ties. These actors then engaged in purposive change processes which were purposive from the formation of the first collaboration and oriented to purposive discursive institutional work throughout the process, rather than to improvisation. This explanation thereby recognises the role of distributed agency and of shared localised knowledge in fostering mutual involvement in the mobilisation of institutionalising processes.

This analysis also presents evidence about the second mechanism of strategic action fields, which is the nature of available, mobilising resources. Previous studies of strategic action fields have examined collaborations with institutionalised and embedded actors (Fligstein and McAdam, 2011), with similar groups of embedded actors situated in different locales (Cooney, 2012) and with social movement challengers and incumbent or embedded actors (Van Wijk et al., 2013; Özen and Özen, 2011). However, this analysis discovered the particular collaborative resources and work evident in a strategic action field comprised of institutionalised and corporate embedded actors from a consumer service sector.

The constituent members of the Canadian retail management education field had access to multiple resources which enabled degree development action. In particular, these heterogeneous actors simultaneously brought heterogeneous resources to the

institutionalisation processes and previous findings have determined that these heterogeneous actors can then build upon each other's resources (Delbridge and Edwards, 2008; Perkmann and Spicer, 2007; Garud and Karnoe, 2002).

These heterogeneous resources included financial, political advocacy, degree granting authority, degree development, process champion, and embedded centrality resources. The embedded centrality resources included Eaton's social influence with other members and suppliers of the retail sector. Fligstein and McAdam (2012, 2011) emphasise that embedded actors' social influence skills are central to the development of strategic action fields. However, this analysis shows that the institutional and embedded corporate actors relied on the other resources so that the degree development process would not be compromised by shifts in the Eaton's social influences. For example, the analysis shows that although Eaton's centrality and related influence were perceived to be a social resource for the mobilisation of the field, these characteristics shifted considerably during the case. As a result, degree granting authority and degree development resources became more important resources and the members of the field pre-empted set-backs to the degree development processes by situating discursive actions within the purview of institutionalised actors, thereby purposely optimising institutional resources.

The third mechanism is demonstrated in the ways that multiple innovative actions are mobilised through the clear identification of a generalised issue based on identified threats. Previous institutional research has identified how important focal issues are to the development of fields (Jones, 2001; Leblebici, 1991). In addition, Maguire et al. (2004, 2001) presents empirical evidence of the importance of framing important

questions during institutional change in social movements. However, as determined by Lawrence et al. (1999), mobilising issues are not naturally occurring. Likewise, this empirical study provides an illustration of how actors in a strategic action field specifically framed generalised issues as moral evaluations of threats. In this case, the framing specifically incorporated a moral-evaluative legitimization strategy to present the threats as critical to the economic viability of an important Canadian consumer service sector. As a result, the multiple innovative actions required to develop institutionalising elements emerged from this generalised issue.

This examination of a strategic action field formed to innovatively develop a sector-specific degree shows the particular nature of collaborations comprised of embedded corporate and institutionalised actors. The empirical findings about these actors are discussed in the following section.

b) Characteristics of Actors: This study discerns the nature of actors involved with institutional innovation. Previous models of collective institutional action have provided ways to understand how institutionalisation occurs through the purposive action of disparate actors (Zietsma and Lawrence, 2010; Hargrave and Van de Ven, 2006). However, studies utilising these models have tended to focus on confrontational relationships between antagonistic entities. In comparison, this analysis provides evidence about the complexities of collaborative action between protagonists. The collaborations involved institutionalised public actors and embedded corporate actors who had not previously collaborated and, although they were competitive, were not in conflict.

This analysis shows that collaborative actors do not emerge simultaneously because of the actions of entrepreneurs (Hargrave and Van de Ven, 2006). Studies of institutionalisation have tended to focus on the instrumental role of individual institutional entrepreneurs in instigating change (DiMaggio, 1988), mobilising resources (Battilana, 2006; Garud et al., 2007; Zilber, 2002) and galvanising networks of actors (Garud et al., 2007; Lounsbury and Crumley, 2007; Perkmann and Spicer, 2007). However, the collaborations in this case formed through emergent events involving multiple actors who transcended the boundaries of public, institutionalised organisations and private, corporate organisations.

This innovative development process began with multiple individual actors (i.e. the T. Eaton Company Limited and Ryerson University), progressed to involve a partnership (ESR), and then various interorganisational collaborations. Each of the collaborations contained highly institutionalised and embedded corporate actors. The collaborations' discursive work was predicated on the institutionalised members' recognition that the collaborative discursive work was inherently institutionalising. The DIW performed by the collaborations structured the meaning of the process and of the resulting institutional dimensions.

Another particular characteristic of the collaborative actors is the nature of membership shifts. Whereas previous research has tended to view exogenous influences or endogenous changes in representation (Huxham and Vengen, 2000) as determinants of membership, this analysis shows a different pattern in membership shifts. For example, although collaborative actors constituted the nature of this strategic action field, their collective identities shifted as collaborations succeeded

each other in different phases of the development process. Throughout the process, collaborations re-formed according to their purpose (Section 5.3.2.2), whilst maintaining strong generalised identity ties. This evidence illustrates how the collaborations regarded strong generalised identity ties as important for institutional development, whilst synchronising membership shifts with phases of development.

The analysis presents the particular nature of the representation in the various collaborations. This case shows that the actors came together to develop innovative actions oriented to a fragmented sector and that there was synchronisation in the representation between institutionalised actors and embedded actors. The patterns in the membership of collaborations show that a balance between embedded corporate and institutionalised members was synchronised throughout the development process. As more institutionalised members (i.e. Ryerson academic Faculties, federal government) engaged in the collaborations, there was also an expansion in the number of embedded corporate members and inclusion of more disparate members of the retail sector (i.e. unions). For example, although unionisation of Canadian retailing is primarily focused on the grocery sector, unions were included in collaborations formed in 1996 and 1997. Other studies in collaborative institutionalisation have established that the determination of membership in collaborations is a political process which can be exclusionary (Gray and Hay, 1986). However, this analysis shows that the membership of the collaborations involved with innovative degree development expanded over time to include different representative members and thereby expanded the diffusion and legitimisation of the new practice. In addition, the expansion of memberships was mutually recommended by institutional and embedded corporate actors.

Furthermore, the findings show that interorganisational collaborations broadened the reach of the discursive work performed during the degree development and during the diffusion of the constituting institutional dimensions. Through the expanded memberships of the collaborations (Table 5.2) and the texts they produced, the constituent discursive distribution incorporated a broader academic community, including the distance education community and the corporate university community. These findings echo those of previous studies (Leblebici et al., 1991) which report how networks contribute to institutional diffusion.

As with the previous example of union representation in collaborations, even though members may not have had resources critical to the degree development (i.e. Community Colleges), their representation in the collaborations' membership could provide legitimacy to the collaboration (Lawrence et al., 1999; Gray and Hay, 1986), because they had interests that might have been affected by the resulting institutionalisation.

The analysis shows that institutionalised and embedded corporate actors had diverse interests in the degree development process and developed converging discursive work to support them. The discursive themes produced throughout the process converged creating, maintaining and disrupting work which incorporated these interests. For example, the federal government, does not have jurisdiction in the provincial higher education system, but does have jurisdiction in national internet connectivity and university innovation. In order to incorporate these interests, the collaborations produced DIW that converged themes about the disruption of the

current state (i.e. no retail management degrees) with the creation of a nationally accessible degree (i.e. via online, distance education). Another example is the convergent discursive theme that maintains how Ryerson academic Faculty (i.e. more institutionalised actors than from the Faculty of Continuing Education) are traditionally the developers of curriculum, but also creates the need for an innovative development practice that includes a knowledge base co-produced with industry.

The analysis shows that when collaborative actors have not previously worked together, they encounter tensions stemming from different decision-making styles and processes. However, in contrast to previous studies of boundary and institutional work in emergent fields (i.e. Zietsma and Lawrence, 2010), the determination of purpose and roles was non-confrontational and was characterised by mutual commitment to a generalised issue around which the collaborations were formed (Hardy et al., 2005).

The analysis shows that this generalised issue presented specific discursive legitimisation for the collaborations' purposes. Moral evaluation and rational-instrumental discursive strategies provided legitimisation of the issue about which the collaborations formed. These discursive strategies also posited that exogenous and endogenous threats were legitimating reasons for the formation of the collaborations. Whereas, studies of institutionalisation processes tend to include the influence of exogenous threats (Greenwood et al., 2004; Rao et al., 2003; Oliver, 1991), this analysis shows that a discursive institutionalising process can also be influenced by endogenous threats and that both influences were instrumental to the generation of collaborations.

This analysis therefore reinforces studies of institutional change that emphasise the distributed nature of participants (Perkmann and Spicer, 2008; Lounsbury and Crumley, 2007; Suddaby and Greenwood, 2001) and that call for the need to understand the nature of distributed agency in institutional work (Empson et al., 2013). Previous research calls for empirical studies that view the actions of multiple actors in institutional development (Leca et al., 2008). The particular nature of the discursive institutional work actions performed in this case is discussed in the following section.

c) Characteristics of Discursive Institutional Work:

This analysis finds that the study's collaborative actors purposely created and synchronised the discursive institutional work (DIW) that formed the strategic action field with the intent of creating a degree using an innovative process of degree development. The granular analysis of the DIW performed throughout this innovative process illustrates the importance of issues, synchronicities, recursiveness, and convergences in this process and the analysis of these characteristics of DIW is discussed in this section. This section then focuses on the various legitimization strategies which are utilised in this case as part of the institutionalisation process, followed by a discussion of the genres of texts utilised throughout the DIW.

As determined in previous studies of collaborative institutionalisation (Lawrence et al., 1999), mobilising issues are not naturally occurring. Rather, this analysis finds that these issues existed as texts that drew on discursive actions and themes. In this case, the identification of threats and the theorisation of how retail management

education would counter these threats was discursively created through multiple themes and texts. For example, the threats appeared in singular themes, and then in converging themes which included other threats and other themes. These singular and converging themes appeared in multiple texts which were diffused to different recipients and thereby provided a foundation for multiple institutionalising actions. The issues central to these discursive themes therefore provided the impetus for further and recursive DIW actions. Whereas previous research on collaborations tends to focus on the importance of problematising issues (Norback, 2011; Dahan and Mangematin, 2007; Lawrence et al., 1999), this analysis shows that in emergent fields the temporal discursive structuring of issues is equally important.

The analysis shows that the different institutional work actions exhibited temporal patterns throughout the development process, and were synchronised into three Phases (see Section 5.4.1, Table 5.4). Whereas phased models of corporate-university collaborations (Buys and Bursnall, 2007; Adams et al., 2001) have focused on academic research collaborations, this analysis shows the particular characteristics of discursive phases in collaborative undergraduate degree development processes.

The Phases echo the three stages of emergence, developmental, and implementation or convergence which are described in Hargrave and Van de Ven's (2006) study of institutional innovation through collective action. However, this analysis demonstrates the particular characteristics of this process, by showing that the Phases of this degree development process exhibited specific characteristics. For example, whereas the Hargrave and Van de Ven (2006) model depicts the final stage as being

constituted by diffusion of the innovation, this analysis shows that innovative degree development processes culminate with the approval of the degree by an institutional carrier (i.e. a University). Furthermore, the Phases in this process were temporally created by the corporate-institutional collaborations for the purposes of advancing the process. The three temporal phases of DIW that characterise this analysis are now discussed.

Interorganisation collaborations and discursive themes featuring the need for a national, sector-based degree are introduced in the first, Inception Phase (1993-1994), and involve IW actions and texts devoted to Creating forms of DIW action. The Creating work was primarily conducted in the popular press, converging in discursive themes advocating that the degree would maintain Canada's retail competitiveness. Multiple, converging DIW was also performed in this phase as these discursive themes were specifically oriented to countering exogenous and endogenous threats to the field. These forms of DIW featured moral-evaluative legitimisation strategies.

The second, Formation phase (1995-1997) included all of the categories of IW actions, including converging work from all three categories. The majority of the Creating work involved Constructing Normative Networks (i.e. C:CNN) and Changing Normative Associations (i.e. C:CNA). Hargrave and Van de Ven (2006) note that networks of actors emerge in the second stage of innovation development and that competing approaches also emerge. These dynamics are also evident in this study's discursive process. The majority of the collaborations were formed in this Phase, as illustrated in proposals for funding and formation. Curricular discursive development

occurred and discursive evidence of pilot courses was produced and distributed. The bulk of the texts were policy genres targeted to the government to secure funding and enable progress of the process. Competing discursive themes oriented to maintaining the sanctity of the university's control of curriculum were evident in this Phase, and they were countered with converging Maintaining/Creating and Maintaining/Disrupting discursive themes.

Over a third of the discursive work in the final, Instantiation Phase (1997-1998) involved Defining and Vesting. The occupational standards were discursively established and the documentation required for degree approval was developed and disseminated throughout the Ryerson University community. Marketing texts were evidently directed at the retail industry, general public, and potential students. Discursive work aimed at educating retailers and the public about the professionalism of a retail management career was prominent.

In this case, there were recursive patterns between all of the primary dimensions of analysis. Multiple DIW actions performed by multiple collaborations resulted in multiple and convergent discursive themes that utilised multiple legitimization strategies, which were produced in multiple genres of texts. These DIW actions constituted regulative, normative and cultural-cognitive institutional dimensions, which then led to further DIW actions and the recursive process continued. This recursive nature is illustrated in the previous discussion of the transactional Phases that emerged throughout the analysis.

This empirical analysis therefore details the dynamics of multiple, converging forms of discursive institutional work. The findings reinforce accounts of institutional work that emphasise its multiple and converging nature (Zietsma and Lawrence, 2010; Perkmann and Spicer, 2008; Lounsbury and Crumley, 2007), and responds to calls by researchers (Lawrence et al., 2011) to empirically develop insight into how IW actions contribute to institutional change. These findings also show that collaborations purposely performed multiple forms of discursive IW to translate endogenous and exogenous events in the process of performing jurisdictional boundary work. Previous boundary work literature claims that the interplay of boundary work and IW is linked to translating exogenous events across boundaries into field practices (Zeitsma and Lawrence, 2010; Zeitsma and McKnight, 2009). This study shows that, at the field level, there were significant convergences of multiple forms of institutional work, involving multiple actors. These multiple forms of IW converge in four ways:

- Creating-Maintaining-Disrupting
- Creating-Maintaining
- Maintaining-Disrupting
- Disrupting-Creating

Drawing from Phillips et al.'s (2004) Discursive Model of Institutionalisation (DMI), discourses that draw upon other texts within the discourse, upon other well-established discourses, and that are coherent and structured are characteristic of institutionalising discourses. The IW actions in this study are co-analysed with legitimisation strategies and establish that certain aspects of the DIW actions exhibited institutionalising characteristics. In particular, discursive themes drew upon each

other and upon other well-established discourses, and converged in their legitimating descriptions and explanations. Competing discursive themes were countered by legitimating themes that were coherent with prevalent discursive themes.

The discursive themes exhibited multiple legitimization strategies, including authoritative, moral-evaluative, rationalising and endorsing strategies. In the Inception Phase, the moral legitimacy of the institutionalising project was established through its focus on the threat posed by foreign retailers to the viability of a Canadian retail industry. In addition, in this Phase, the personal, authoritative legitimacy of the Eaton family and of the University were discursively established and these legitimization strategies were utilised in texts directed to the federal government. They served to legitimise discursive themes about the need for a nationally available, sector-based degree, which was aligned with the federal government's educational purview.

This personal authoritative legitimacy shifted in Phase two to emphasise the rationalisation of the degree development process. The discursive legitimization strategies in Phase two maintained a moral evaluation of the need for a national degree. The discursive work also emphasised theoretical and instrumental rationalisation themes throughout Phases two and three. These themes were continuously linked to the development of the regulative dimensions of the degree (i.e. the degree/course requirements) and of the normative dimensions of the development process (i.e. the need for industry input). In other words, the legitimacy of the new institutional elements was established through rationalising messages about industry's participation in the degree development process.

This analysis also shows that there were tensions between institutionalised (i.e. university and governments) and embedded corporate actors in the multiple ESR collaborations. Previous studies of institutionalising collaborations have focused on particular effects of issues (Lawrence et al., 1999). In particular, they have focused on how contentious interests and understanding of issues characterise discursive collaborations. However, in this case, tensions were not related to the construction of generalised issues (Lawrence et al., 1999), conflicting agendas (Zietsma and Lawrence, 2010) or determination of roles and responsibilities (Lounsbury, 2001). Instead, they were specifically associated with different views of the requirements of an institutionalising process, including what elements needed to be maintained and which needed to be disrupted. The analysis discerns that collaborating members recognised the tensions as cues that they needed to perform discursive work maintaining some institutional norms whilst simultaneously creating new norms. As a result, they performed multiple forms of DIW to maintain members' cultural prerogatives whilst simultaneously constructing new normative associations about institutional processes. For example, the collaborations produced texts devoted to documenting the process, which was a requirement of institutionalised members and also produced texts focused on creating norms about university education to distribute to current and potential students in the retail sector. Notably, these collaborations had high levels of involvement and of generalised identities, which were discursively established in proposals, membership lists, reports and action plans.

This study provides empirical evidence of the DIW that instantiated the legitimacy of industry involvement with university processes and thereby, responds to calls from researchers (Powell and Colyvas, 2008; Colyvas and Powell, 2006) for studies that examine the genesis of these specific types of organisational practices.

DIW was produced in multiple genres of texts, by multiple actors. These genres of the texts were recognisable, interpretable, and usable in other organisations and were therefore inclined to produce institutionalisation (Phillips et al., 2004).

Institutionalising texts were produced for a number of purposes that align with the Maguire's (2004) model, which categorises texts by types of genres. For example, reflexive work was produced by technical genres of texts which included learning tools and which constituted normative and cultural-cognitive institutional dimensions. This study presents data from two academic case studies – one oriented to distance education (Document #23) and one to higher education (Document #83), which were specifically reflexive in nature, and examined multiple dimensions of the process.

In addition, this study shows the significance of multiple types of IW action on producing purposive texts and discourses. For example, different types of IW action produced structured discursive themes about the need for professionalisation of Canadian retail management via a degree programme. Different proposals, reports and materials contained coherent and structured discursive themes which were iterative and replicative (Phillips et al., 2004). The texts and themes were simultaneously oriented to convergences of IW action – i.e. they were oriented to disrupting the notion that there was a dearth of retail management education, while, at the same time, creating the need for an innovative degree programme.

The analysis also shows evidence that this DIW constituted institutionalisation throughout the process, by developing the characteristics of three institutional dimensions.

d) *Characteristics of Institutional Dimensions:* The literature review in Chapter Two (see Appendix A, Table 2.2) shows a gap in research providing empirical examples of institutional work oriented to discursive legitimating of field boundaries through degree development. This study provides a detailed empirical analysis of particular professionalising discursive strategies.

This study finds that professionalising occupational boundary work is manifested through degree development. In particular, professionalising discursive work established the cultural-cognitive dimensions and rationale for the retail management degree. Previous research has examined how professionalising occupational boundary work is manifested through discursive identity construction (Goodrick and Reay, 2010; Lounsbury, 2002), the creation of standards (Slager et al., 2002) and through the maintaining work of elite professionals (Currie et al., 2012). However, this current analysis broadens this purview by explaining how specific discursive work focused on professionalisation through degree development.

The specific discursive work involved with professionalising the boundaries of an occupational field included cohesive, structured, and legitimating discursive themes produced in multiple genres of texts. Even though the specifics of degree development were the focus of the institutionalisation process, the professionalising

discursive work operated on all three dimensions of boundary development – making jurisdictional claims, discerning a distinct body of knowledge, and determining specific educational requirements (Muzio et al., 2011).

Discursive themes about retail management's jurisdictional claims were prominently featured throughout the second Phase when they regularly appeared in trade media and popular press articles, thereby garnering attention about the need for a professionalising programme. Likewise, discursive themes in similar texts were produced in the final Instantiation Phase and focused on how professionalisation positively affects the attractiveness of a retail management career. In particular, the professionalised nature of the career was featured in genres of texts produced for and distributed to potential students for the degree. For example, the NSAS produced specific marketing genres of texts aimed at educating potential students about the value of retail management careers.

The discursive establishment of a distinct body of knowledge was prominent in Phases two and three after the discursive institutional work involved with assessment and reporting of the occupational standards and degree requirements was in place. For example, discursive work about the purpose and importance of the Eaton Chair specifically developed a distinct body of knowledge about retail management. Likewise, previous research (Khurana and Nohria, 2008; Trank and Rynes, 2003) has identified that the establishment of a discrete knowledge base is a critical dimension in developing boundaries in management occupations.

Discursive work revolving around specific educational requirements for retail management were concentrated in the latter part of Phase two and in Phase three, when the degree requirements and approval were established.

This analysis finds that regulative dimensions were critical to the establishment of an institutionalised practice of degree development. In keeping with Scott's (2001) assertion that pillars do not work in isolation, the analysis also finds that recursive relationships with normative and cultural-cognitive dimensions supported the constitution of regulative dimensions. Previous research has shown how collaborations use institutional rules and resources to negotiate problem definitions, collaboration membership and problem-solving practices (Cooney, 2012; Phillips et al., 2000). This study shows the particular discursive mechanisms that collaborative actors used to transfer rules and resources within institutionalised settings. In this case, new regulative dimensions were mutually determined by the heterogeneous actors in the collaborations. For example, the IAS collaboration produced a report which provided the discursive foundation for the proposal to Ryerson's Senate about the undergraduate degree in Retail Management. This report referenced all of the collaboration's previous DIW, including the ESR programme development. As a result, the new degree's rules and regulations were grounded in the innovative, collaborative development process detailed in the IAS report.

This analysis, therefore, provides an investigation of a collaborative practice of undergraduate degree development in an emergent strategic action field, which constitutes an innovative institutionalisation process.

Throughout the investigation, a particular case study research methodology is operationalised, and its distinguishing characteristics are discussed in the following section.

6.4 Research Objective #3:

This study establishes an analytical framework that applies discursive institutional work analytic processes. The analytic process is applied through an empirical case study in order to provide explanations of processes of institutionalisation. The development of this framework thereby satisfies this study's third research objective.

Establish a case study research methodology that applies discursive institutional work (DIW) analytic processes.

Discursive analytic approaches are commonly used in institutional work studies, particularly with historical cases (i.e. Holm, 1995). This study shows how a qualitative analytic process that investigates the interplay of dimensions of actors, discursive work, and institutionalisation is applied in a unique case study.

Throughout this thesis, iterative forms of the analytic framework have evolved. Beginning with Figure 2.1 and culminating with Figure 5.2, the dimensions and processes of the DIW model have emerged. Because the research design was inductive, the nature of the dimensions in the model did not stabilise until the analysis was complete. For example, until then, professionalisation had not been viewed as constituting the cultural-cognitive institutional pillar.

In the process of operationalising the methodological framework, it became apparent that two of the a priori models that constituted the framework did not provide sufficient dimensions to adequately categorise the data presented in the case. The first was Van Leeuwen's (2007) model of legitimisation strategies which was used as a framework for the analysis of the types of discursive legitimisation evident in the study. The dimensions of Van Leeuwen's framework did not fully capture the particular nature of legitimisation in this educational setting. That aspect of legitimacy is provided by discursive endorsement by other institutions (i.e. government, universities, accrediting bodies, sectoral associations, and unions). Discursive endorsement by these institutions is particularly important for a degree development process to advance, because their approval is often a requirement for progressing.

The second a priori model that did not produce adequate dimensions was Maguire's (2004) model which categorises genres of texts. This analysis shows two categories of text genres that are not captured in the four dimensions of Maguire's (2004) model. The first is produced for the specific purpose of informing the opinions of members of the retail industry and business community, who were also constituents of the strategic action field. This category is referred to as the field genre in the analysis (see Section 5.6.3) and important texts include industry association newsletters and trade publication articles.

The second additional category of text genres evident in this empirical study is specific Reflective-Purposive texts (see Section 5.6.6). These texts illuminate the efforts entailed with actors' reflexive and purposive work. This analysis, therefore, provides a response to Lawrence et al.'s (2013) suggestion that more studies should

focus on the effort involved with institutional work (IW). Lawrence and Suddaby (2006) and Lawrence et al., (2009) emphasise that reflective purposiveness is an important characteristic of IW, yet Lawrence et al., (2013) note that it is difficult to produce empirical evidence. In this study, however, multiple documents (Documents # 3, 12, 24) are produced with the expressed purpose of documenting the process, in order for others to learn from the process. These text genres have a particularly legitimating influence because they are explicitly required by highly institutionalised actors.

These Reflective-Purposive text genres are important features of this study because they provide punctuation for the temporal progression of the institutionalisation process. They provide temporal brackets which enable the identification of the theorising mechanisms evident over the time of the process. In addition, they reflect a particular characteristic of collaborations involving institutional and corporate embedded actors. These collaborations recognise that their processes constitute institutionalisation and that clear documentation of the processes contributes to the instantiation of the new institution.

As a result, the Explanatory DIW Analytic Model (Figure 5.2) is an amalgamation of a priori models and the emergent theoretical insights afforded through this investigation process. Furthermore, the model has been operationalised in this study to investigate an institutionalisation process through DIW analytic processes. This study, thereby, responds to Langley et al.'s (2013) call for theoretical and empirical research that adopts an interpretivist perspective, and in particular, for research based on an

ontology of process that produces insights into methodological sources of process knowledge.

6.5 Chapter Six Summary

This study produces a discursive model of institutionalisation. Specifically, the model presents a framework of discursive institutional work applied in the context of an innovative degree development process. Collaborative actors produced discursive work with the common purpose of professionalising a retail management career through a retail management degree. The analysis of the case study data shows coherent and structured discursive patterns, which coalesce in a comprehensive example of discursive institutionalisation. This Chapter presents a discussion of the insights produced through this analysis and provides a thorough understanding of the complexities presented in this study. The final Chapter presents the study's contributions, areas of future research, limitations of the study, reflections about its process and then presents a definitive answer to the research question.

Chapter 7: Conclusions of the Thesis: Contributions, Limitations, Recommendations for Future Research, and Reflections

7.1 Introduction

The purpose of this thesis is to understand the discursive processes that constitute institutionalisation. In particular, it has developed an understanding of the processes associated with an innovative collaborative practice of undergraduate degree development. Institutional research has been inconclusive about the nature of the processes, particularly in the context of the development of a degree in retail management. As a result, this study sought to answer the following research question:

How do discursive processes institutionalise an innovative practice of retail management degree development?

In order to answer the question, the study established three research objectives. Previous chapters have produced a comprehensive investigation of these objectives and the situation and conditions of this study. In particular, Chapter Six provides the findings that satisfy each objective and this Chapter consequently translates how the findings that satisfy these objectives provide particular theoretical, empirical, methodological, and practical contributions, and ultimately provide an answer to the overarching research question.

This Chapter begins by presenting the theoretical contributions of this study, which are related to the satisfaction of the first objective. The Chapter then provides the study's empirical contributions by virtue of the results of the case study analysis. The following section presents the study's methodological contributions, which are related to the third objective, and the Chapter then provides contributions of a practical nature

for retail practitioners, educators, and other occupations. Limitations of this study are then presented, followed by suggestions for potential areas of further research and reflections on the research process. Finally, the Chapter concludes the thesis with the answer to the study's research question.

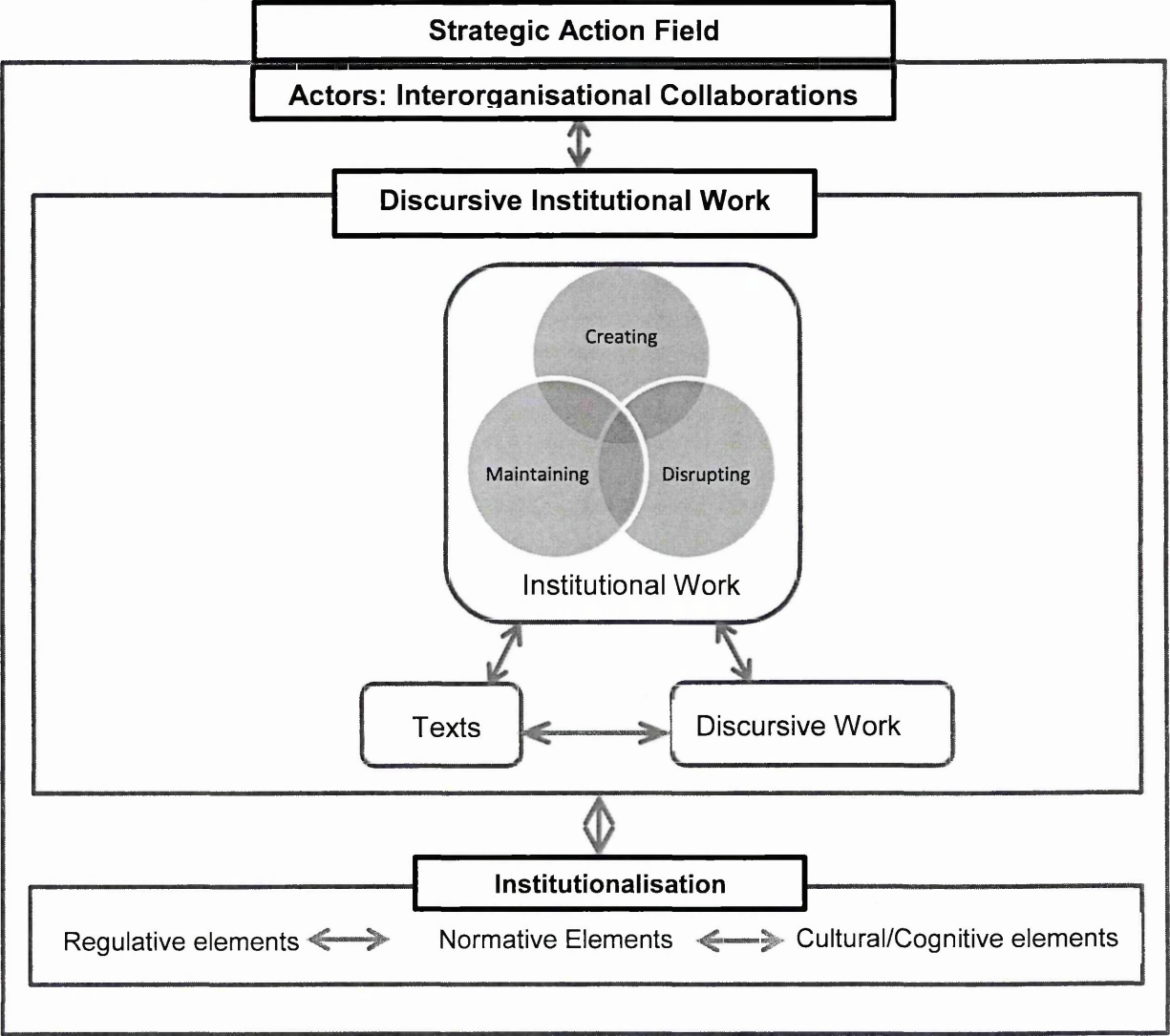
7.2 Theoretical Contributions

This thesis has produced an explanatory model of discursive institutional work processes, which specifies the conditions in which it may provide explanations, as determined through satisfaction of the first of this study's research objectives:

Develop a discursive model of institutionalisation processes by specifying the conditions in which it may provide explanations.

The theoretical framework developed in Chapter Two (see Figure 2.1) conceptualises how institutionalisation of an innovative practice occurs through discursive processes. This conceptualisation contributes to theoretical conversations about institutionalisation processes, especially those involved with the development of innovative practices. This framework provides the basis for transferring patterns in the process to other settings, by explaining how generative forces can act to produce contextualised institutional dimensions. In particular, it establishes that institutional work is constituted through discursive actions. The resulting process is referred to in this study as discursive institutional work (DIW). DIW presents a way of understanding how the dimensions of institutional work theory are operationalised through discourses and thereby constitute a process of institutionalisation.

Figure 2.1 Conceptual Framework of Discursive Institutionalisation Work Process (Source: developed for this study)



The processes depicted in Figure 2.1 constitute the development of an innovative institutional practice and the framework presents the elements and relationships that constitute the processes. These relationships occur between a strategic action field and its constituent actors, between these actors and the discursive institutional work (DIW) they produce, and between these DIW processes and the development of institutional elements, which constitute institutionalisation. The DIW is constituted by three elements: a) Institutional Work actions in the forms of creating, maintaining and disrupting types of legitimating discursive themes, b) discursive work in the ways the

themes interact, and c) genres of texts that produce and distribute the themes. The resulting institutionalisation is constituted by three institutional elements: regulative, normative and cultural-cognitive elements.

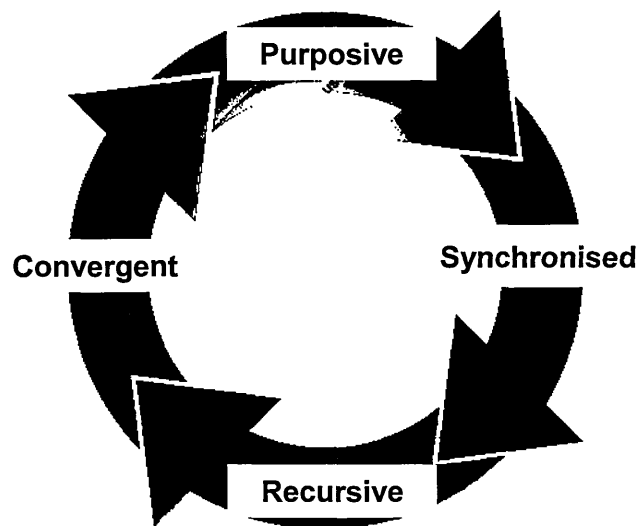
In particular, this process theory contributes to discussions about change in fragmented and emergent occupational fields with amorphous boundaries. It establishes that although institutional entrepreneurs may be involved with the instigation of change, collaborations between previously unorganised, institutionalised, and corporate actors provide an alternate explanation about who affects institutional change and the processes associated with institutionalisation.

Specifically, this model (see Figure 2.1) explains how diverse organisational actors come together to discursively mobilise the development of an innovative institutional practice. By doing so, this process theory provides a way to explain how practitioners draw upon discursive resources in distinct ways, for certain purposes, and in the context of particular activities (Sandberg and Tsoukas, 2011). The result is a conceptual model that provides a guide for better understanding of the concept of innovation-in-action, and more specifically, institutional innovation-in-discursive action.

This process explanation of institutional innovation-in-discursive action features particular relationships between its constituent dimensions. The explanation argues that institutional structuration in an emergent field can be constituted with the participation of diverse actors and that coherent, shared systems of meaning can dominate if discursive institutional work is done in all institutional dimensions.

Therefore relationships occur between a strategic action field and its constituent actors, between these actors and the discursive institutional work they produce, and between these discursive institutional work processes and the development of institutional dimensions. These relationships are characterised as purposive, synchronised, recursive, and convergent. These characteristics are depicted in Figure 7.1 and explained in the discussion following Figure 7.1.

Figure 7.1 Characteristics of Relationships Between DIW Dimensions



The relationships between the process dimensions are purposive. Heterogeneous actors in a strategic action field mutually identify diverse influences as justifying the purposive mobilisation of collaborative action. Multiple, localised influences contribute to field formation by galvanising generalised ties to the field’s purpose and to the constituting collaborations. Diverse organisations are then able to collaborate in the production of DIW that constitutes common meaning about the collaborations’ purposes and the processes with which they are involved.

Multiple collaborations are therefore formed for multiple discursive purposes. The discursive purposes of these collaborations include the development, synchronisation and reiteration of specific discursive themes, which are then produced in purposive texts. The actors' purposive actions then manifest institutional development through these themes and texts. They also include purposive actions about the nature of the legitimisation provided by the themes, and the production of specific genres of texts. In particular, DIW focused on legitimisation through professionalisation is central to processes involved with occupational boundary work in emergent and fragmented fields.

Purposive, discursive collaborations between corporate, embedded actors and institutionalised (i.e. from universities and government) partners are also central to institutionalisation processes in these fields. The production of discursive themes and texts provide legitimate, generalised identity ties for the collaborations and each of the collaborations also purposively develop particularised discursive ties about interdependence, authority and roles. These institutionalised and corporate embedded actors provide multiple forms of legitimisation for the collaborations' DIW actions. The institutional members provide authoritative legitimisation, by virtue of formal authority vested to them through the state. The embedded corporate actors provide rational-instrumental legitimisation because they are able to draw on localised, sector-specific knowledge and resources. These collaborations therefore purposely optimise institutionalising resources and are able to pre-empt set-backs to institutionalising processes by situating the production of discursive actions within the purview of the collaborations, rather than with individual actors. When the processes feature collaborations of institutionalised and embedded corporate

organisations, they provide legitimisation through discursive work that is constitutive of institutionalisation. The study's findings show explicit evidence of purposive actions and also show evidence of institutional structuration, thereby contributing to the ongoing discussion of the dynamics between agency and structure in institutional work studies

The relationships between the dimensions of the institutionalising process also exhibit synchronised patterns. Membership in collaborations is synchronised throughout the development process, so that there is a balance between embedded corporate and institutionalised members. This pattern reflects how an institutionalising process needs to be able to broaden the reach of the discursive work performed during the process and during the instantiation of the constituting institutional dimensions.

In addition, shifts in the membership of collaborations are synchronised with phases of DIW that is produced during the development process. The membership of these collaborations is thereby coordinated with the iterative phases of DIW, which they need to perform in order for the development process to progress. Within the phases of DIW, there are synchronised patterns of discursive structuring. For example, when the genres of texts are synchronised, they provide the groundwork for the institutional work performed in other genres. In addition, in order for the institutionalising process to be cohesive, actors produce synchronised temporal descriptions of the process in the forms of plans, proposals, reports, schedules, lists and reflective, punctuating texts.

The relationships between the DIW dimensions are also recursive in nature. For example, the relationships between collaboration membership and DIW actions are

recursive. The nature of collaborations is determined by the DIW actions required to advance the process and the DIW actions are determined by the members of collaborations. The recursive nature of the collaborations' membership is also temporally determined by the constituent actors' determination of the purposive DIW required. In addition, the relationships between DIW actions and institutionalising pillars are recursive.

This process theory conceptualises that purposive institutional work also involves convergences of multiple types of DIW. When the membership of collaborations includes institutionalised and embedded corporate actors with diverse interests, they perform converging discursive work in order to support the diverse interests. Multiple forms of DIW occur simultaneously in discursive themes and in the nature of the genres of texts in which they are produced and distributed. These convergences feature multiple legitimation strategies and are present in every phase of the process. Multiple, convergent DIW actions therefore affect institutional change while operating within the regulations, norms, and expectations related to prevalent institutional processes.

This theoretical framework provides explanations about how institutionalising processes occur in a particular context. By determining the nature of the various influences and dynamics associated with the processes, and synthesising them within a conceptual framework, other researchers will thereby be able to examine how these dimensions interact in other contexts. The application of this framework in an actual case provides an empirical contribution to the body of research focused on discursive

institutionalisation processes. This empirical contribution is discussed in the following section.

7.3 Empirical Contribution

This study makes a number of empirical contributions, by providing an examination of the nature of interorganisational collaborations performing discursive boundary work in a strategic action field. In particular, this study presents an empirical investigation of an innovative degree development process. The main empirical findings were summarised in Chapter Six (see Section 6.3), however this section presents a synthesis of these findings related to the second research objective:

Investigate a collaborative practice of undergraduate degree development in an emergent strategic action field, which constitutes an innovative institutionalisation process.

This empirical study has determined that collaborative actors purposely create and synchronise the discursive institutional work (DIW) that forms a strategic action field around the intent of creating a degree based on an innovative process of degree development. In addition, the natures of actors and processes involved with collaborative degree development in a fragmented occupational field with amorphous boundaries have particular characteristics. This was the nature of the Canadian retail management education field which was fragmented and populated with corporate embedded actors and institutionalised public actors. The geographical setting of this study is important because consumer service organisations are intrinsically linked to the vagaries of their local geographic and social landscape. For example, the understanding of the Canadian political context in regards to educational jurisdictions

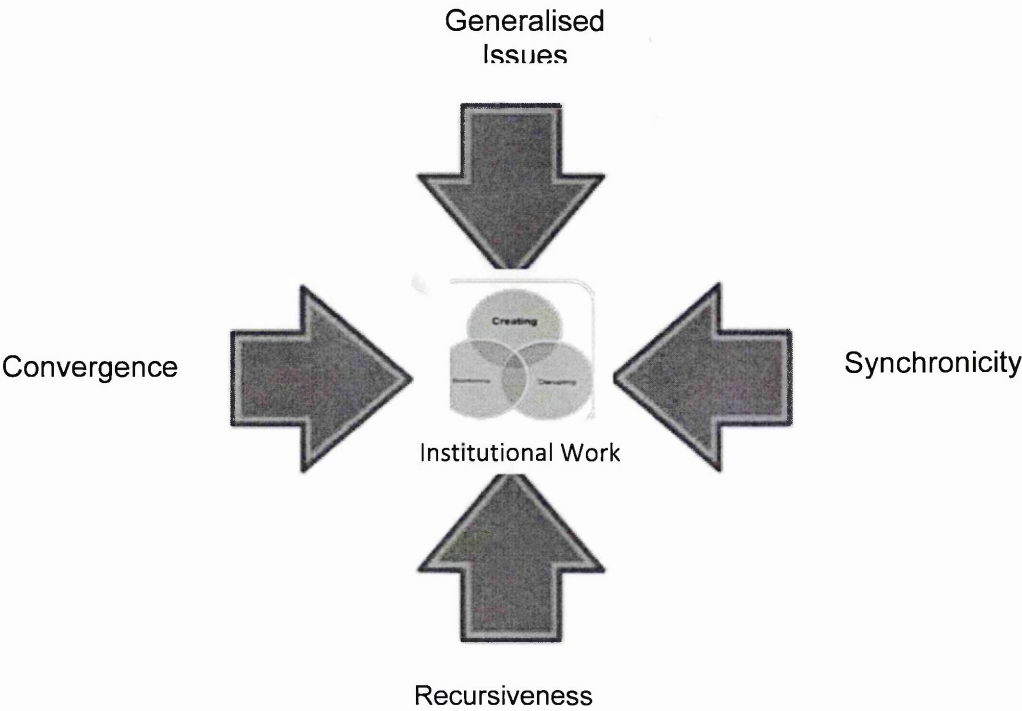
and the understanding of the Canadian retail industry helped to make sense of the role of particular texts.

Although the collaborative actors had not previously collaborated, and had diverse interests in the process, they collaborated as protagonists of the process and were able to mutually identify diverse influences as being potentially motivational. Prior to this study, for-profit, consumer service sectors had been virtually ignored in institutional studies. In addition, they were rarely featured in research related to university-corporate collaborations.

Over time, the membership of the collaborations expanded to include different representative members and thereby expanded the legitimization of the new practice. However, collaborations also encountered tensions which stemmed from different decision-making styles and processes, which were mediated by mutual commitment to the generalised issue around which the degree development process converged.

The findings also establish the importance of four characteristics of the DIW performed throughout the process: generalised issues, synchronicity, recursiveness, and convergences which are portrayed in Figure 7.2 and explained in the discussion following Figure 7.2.

Figure 7.2 Characteristics of Discursive Institutional Work (DIW)



The findings show that collaborations purposely utilise these four characteristics in the DIW they perform, in order to institutionalise the innovative degree development process. Strong generalised issues are regarded as important for institutional development and they are communicated in the discursive themes and texts produced during the process. These issues are central to identity ties which are discursively produced and define collaborative purposes, roles and responsibilities. The discursive framing of these issues specifically utilises legitimating strategies that convey moral-evaluation, rationalisation and endorsement. For example, in this case, discursive themes that presented threats from US/global retailers as critical to the economic viability of an important Canadian consumer service sector were utilised. These generalised issues also frame the mobilisation of the multiple innovative actions required to develop institutionalising elements.

When collaborations include institutional members, the collaborations' discursive work is inherently institutionalising, in part because of its synchronised nature.

Synchronous IW is temporal in nature (i.e. in recognisable and usable patterns), and is related to three phases of Inception, Formation and Instantiation. These synchronous patterns are also characterised by their reflective nature, in that the processes are documented and replicable. They are also punctuated by reflective texts.

Shifts in collaboration memberships are also synchronised with associated shifts in phases of development. For example, in this case, the actors interacted as needed, in multiple collaborations to produce particular texts for the purposes of developing an innovative degree development process.

When performing occupational boundary work in fields with amorphous boundaries, the recursive structuring of issues and of texts is important. Professionalising discursive themes are reiterated throughout diverse genres of texts. In particular, legitimating genres of texts including policy, technical, reflective-purposive and field-specific texts include recursive arguments that constitute the need for professionalisation. Likewise, the regulative, normative and cultural-cognitive dimensions of new degree development practices are mutually recursive. They build upon the facets of each dimension and also spur new discursive actions. For example, in this case, when new certificate regulations were defined, they reinforced the characteristics of similar educational programmes (i.e. normative dimensions).

Likewise, new regulations spurred the discursive development of new collaborations to discursively create other aspects of the process.

DIW processes involving multiple collaborations use multiple convergent discursive processes to legitimate innovative degree development processes. For example, discursive themes draw upon each other and upon other well-established discourses, and converge in their legitimating descriptions and explanations. Competing discursive themes are countered by legitimating themes that are coherent with prevalent discursive themes. When collaborating members recognise tensions in decision-making styles, they use them as cues that the collaborations need to perform discursive work maintaining some institutional norms whilst simultaneously creating new norms. As a result, they perform converging forms of DIW to maintain members' cultural prerogatives while simultaneously constructing new normative associations about institutional processes. For example, institutionalised members have specific processes which need to be maintained, within the context of creating a new process.

Whereas this study makes an empirical contribution through the findings of this case study analysis, the analytic approach used to produce the findings provides the basis for this study's methodological contribution.

7.4 Methodological Contribution

This study not only provides an empirical example of an application of a discursive institutional work analytic approach, it also develops a particular analytic framework for the empirical study. This study thereby makes a methodological contribution by

developing and operationalising an original discursive institutional work (DIW) analytic framework as specified in the third research objective:

Establish a case study research methodology that applies discursive institutional work (DIW) analytic processes.

This DIW analytic framework provides an analytic mechanism for examining the dimensions of a process of collaborative institutionalisation. The dimensions include the characteristics of strategic action fields, their constituent collaborative members, their discursive institutional work (DIW), and the constituted institutional dimensions. The framework affords a way of examining the purposive, temporal, synchronised and recursive nature of an institutionalising process.

This framework integrates the categories of Institutional Work with legitimating discursive strategies, and therefore, it provides a comprehensive analytic approach to examining the discursive actions that constitute institutional development. This framework thereby operationalises IW through a discursive model of institutionalisation and applies it to investigating a unique case study.

Whilst the analytic framework integrates dimensions from a priori models, it makes a methodological contribution by inductively determining new dimensions through which an institutionalisation process can be examined. The first discovery is that occupational institutionalisation processes include endorsement strategies that discursively legitimate the processes. This analytic framework, therefore, includes endorsement strategies as a dimension for analysing legitimisation strategies used in institutionalisation. In addition, the framework includes two types of genres of texts which have not been previously determined. These genres of texts are field and

reflective-purposive texts, and they are produced by collaborations in strategic action fields to expand their discursive reach. These dimensions are included in the analytic framework developed through this study.

By applying the framework in an empirical setting, this study provides particular and reflective observations about the scope of the model's application. For example, this analysis is a meso/field-level case study investigation involving institutional and embedded corporate organisational actors. The DIW framework provided a consistent and thorough approach to analysing the particular characteristics of this level of investigation.

This study also provides insights for a variety of practitioners from the retail sector, the educational community and other occupations. The following section provides a discussion of these practical contributions.

7.5 Practical Contributions

The findings of this study are of practical interest to retail practitioners, educational providers of retail management programs, and practitioners from other occupational fields who are interested in degree development.

The study provides retail practitioners with knowledge about how to develop and support a professionalised career identity for retail managers. In particular, it presents an organising discursive mechanism for the cultural-cognitive elements that are central to creating meaning about retail management as a professional career. As determined in Section 5.7.3, these elements include discursive strategies that

constitute the occupation's jurisdictional claims, a discrete body of retail management knowledge, and specific educational requirements.

This study also provides practitioners with insights about collaborating with educational institutions in the ongoing curriculum development and delivery of retail management programs. Practitioners should recognise that collaborating with institutional partners to create new practices requires discursive work that simultaneously maintains particular institutional elements and creates innovative practices.

These insights also extend to collaborations with non-educational institutional partners. Retailers who engage in multinational operations should recognise that potential collaborations with institutionalised partners (i.e. governments, health-care providers, universities etc.) will exhibit characteristics that are evident in this study. These collaborative processes can benefit from discursive institutional work that recognises the mutual and diverse needs of members and the specific types of discursive work that constitute institutional dimensions of new practices.

Likewise, educational providers can look to this study's findings for insights about incorporating industry participation in the development and support of retail management programs. They should recognise that the characteristics of the embedded corporate actors in this study are instrumental when co-developing the processes associated with relevant and attractive programmes. In particular, educational providers should note that industry collaborators broaden the reach of discursive work, so that the scope of field level communications is extended. In

addition, collaborating with corporate actors changes the temporal pace of development processes, which requires that educational institutions have mechanisms in place to accelerate their usual processes.

This study also provides insights for participants in corporate-university partnerships. Whereas previous research has investigated corporate-university partnerships from the viewpoint of adult education (Oh and Park, 2008), transfers of learning, and best practices (Blass, 2005; Blass, 2001; Meister, 1998), this study provides an understanding of how these partnerships contribute to broader field-level occupational effects. In particular, this study shows that these partnerships need not be restricted to specific organisational learning agendas and that they contribute to the body of knowledge that constitutes the professional nature of management occupations as a whole.

Other occupational fields that are challenged by management recruitment issues will also be informed by this study's results. In particular, they show that an occupational field can utilise multiple forms of discursive work to develop and support a more professional image. Embedded actors from these fields can look to these results for insights about how to create discursive work that creates new normative associations about the field and constructs career identities. These discursive processes are central to findings about the boundary work performed in this case, as are the specific types of field genres that legitimate the jurisdictional claims of emerging occupational fields.

In addition, occupational fields that are facing changes (both exogenous and endogenous) in their task environment will find insights about developing innovative practices that involve institutional collaborations. This study provides in-depth knowledge about the specific characteristics of interorganisational collaborations and of multiple discursive strategies. In particular, these fields will benefit from findings about the individual characteristics of collaboration members and the types of ties that contribute to collective identities and involved/embedded collaborations. They will also recognise the tensions that emerge from the cultural differences between institutional and embedded corporate actors.

Finally, this research has implications for the occupation of retail management. This study recognises the valid claim that retail management makes as a professional career, by virtue of the discursive work that was performed in the process of developing a retail management degree. Multiple legitimating strategies and professionalising discourses contributed directly to the development of the building blocks of a more professionalised career. Although the degree was the culmination of the process, the institutionalising constituents included complex regulatory, normative, and cultural-cognitive dimensions, which are now established and contribute to the occupation's evolving nature.

7.6 Limitations of the Research

Several limitations were encountered during the study, that influenced the nature of the empirical investigation and the scope of the interpretations. The study was limited by the nature of the documentation that formed the basis of the case study. Because the case occurred before the advent of electronic filing, access to data was

dependent upon hard copies of documentation. Even though there was a rich collection of data, the bulk of the documentation had been collected by the General Manager of the ESR. The items that were kept had been subjected to his personal filter, triggered by his preferences, experiences or by loss and damage during office moves. Other potential sources of data had been destroyed and most participants had passed, retired, moved, or become otherwise inaccessible. Although the data is therefore organic in nature, the DIW model should be applied in research settings that are not dependent upon a unique case or historical data.

The scope of interpretations is limited by the specific characteristics of the context of the study. The Canadian retail setting constitutes particular characteristics that limit the scope of interpretations to characteristics of fragmented and amorphous fields. However, further empirical investigations in different geographic and sectoral settings would expand understanding of the conditions that affect how the DIW model is operationalised.

7.8 Recommendations for Future Research

Although this study addresses how discursive institutional work is manifested in a development process, the DIW analytic model should be applied to further empirical research in order to expand understanding of the nature of its dimensions and connections. For example, applying the DIW model to a completely amorphous field, like the Ansari and Phillips' (2011) study that examines consumers as a field, would help to reveal information about disparate collaborations and their related motivations. In addition, whilst this study applies the framework to a field-level analysis, future

research should operationalise the model in studies at the organisational, societal, and at multiple levels of analysis.

In particular, research about institutional-corporate degree development programs in other management strategic action fields would shed light on prevailing institutional effects and on collaboration characteristics that influence the development process. Research about industry involvement with curriculum has been called for in the academic literature and relates to the educational requirements and body of knowledge that constitute management education. In particular, the professionalisation of management occupations involves industry-university collaborations and few universities are organised to embed ongoing industry participation in curriculum development.

In addition, an examination of how the DIW model operates when there is a change in the nature of an institution – i.e. when structure drives agency – would provide better understanding of the complexities of institutionalisation. For example, studies set in these conditions could examine how collaborations and the nature of their involvement are changed. They could also examine at what stages changes occur and what sorts of discursive IW are instrumental during those stages.

Whereas the DIW analytic framework has been applied to this empirical study of change and innovation development, it should also be applied to empirical studies involving the stability of institutional practices. These studies would investigate questions related to the discursive institutional work involved with maintaining practices.

Finally, whilst this study has taken an institutional approach to investigating this phenomenon, an actor-network approach could provide insights about the specific nature of the Eaton's role. In particular, these studies should consider the impact of Eaton's original vision for Canadian retail management education, and of the behaviours and influences of the individuals who spearheaded the development of the vision within the Eaton's organisation.

7.9 Reflections on the Research Process

As discussed in Section 4.8.2.5, this inductive research process involved numerous decisions related to challenges in interpreting the emerging data and determining theoretical implications of the findings.

However, the most important insight of the process was the decision that the research was grounded in a process ontology. By adopting this perspective, the researcher also accepted that the development process was inherently temporal in nature and that causality occurred through chains of events. As a result, she recognised that the investigation needed to track the temporal nature of the process, and thereby track the evolution of the process.

Without adopting this perspective, the particular findings of this research would not have emerged. Her first understanding of the data was that the originating corporate-university partnership had a causal influence on the process. However, by accepting that the collaborations were dynamic, she was able to recognise the particular characteristics of institutional/corporate collaborations that contributed to the formation of the strategic action field. In addition, she was able to discern the

distinctive forms of DIW that the collaborations performed over time, including reflective/purposive and field genres, endorsing legitimative strategies, and multiple IW actions. The temporal phases of the process development took on meaning as she recognised that particular forms of DIW served to bracket the phases, thereby affording an opportunity to identify the theoretical mechanisms at work.

Finally, by recognising that specific professionalising discursive strategies were utilised throughout the process, she was able to discern that they constituted the necessary legitimation to establish a new understanding of an occupation's value. These professionalising strategies were purposively used to develop specific cultural-cognitive institutional elements that supported the need for a new degree development practice.

Most importantly, this process perspective affirmed the researcher's personal philosophy. The thesis process presented many opportunities to question this view of reality; however, it also delivered a cohesive and coherent affirmation of its validity.

7.10 Chapter Seven Summary

The purpose of this study was to understand how discursive processes constitute the institutionalisation of an innovative collaborative practice of degree development.

The process chosen to develop this understanding was to investigate the collaborative development of a unique retail management degree, and thereby answer the research question

How do discursive processes institutionalise an innovative practice of retail management degree development?

The answer that this study discovered was that discursive processes are integral to developing innovative institutional practices because they constitute the work that brings these practices into being and thereby gives them meaning.

This study explains how diverse organisations collaborate to create new practices. It explains how they utilise multiple forms of texts and language to mobilise diverse processes. Furthermore, it explains how these processes progress and support unique and meaningful practices. And, in particular, it explains how these processes can be applied to creating new meaning for an occupation.

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Appendix A

Table 2.2: Empirical studies utilising Institutional Work theory (Lawrence and Suddaby, 2006) n=70

Studies	Research Method	Research Setting	Type of IW	Coll-ective	Key Findings
Creating n=26					
Ansari and Phillips, 2011	Archival analysis Interviews Conferences	Text messaging adoption by consumers	C:CNA		Consumers are fragmented field Technological adoption catalysed field-level changes
Covalessi, Dirsmith and Rittenberg, 2003	Latent content analysis Archival material	Big 5 public accounting firms	C:CI		Profession reinsitutionalises jurisdiction and expectations of professional behaviour, through rhetoric of 'knowledge experts'
Dahan and Mangematin, 2007	Interviews	French doctoral education	C:CI, C:CNA	✓	Proximity main mechanism for new practice diffusion, with interdependent actors - problem definition change driver without interdependency Deviance from new norms affects legitimacy
Elsbach and Sutton, 1992	Grounded theory Interview, archival and observational data Counted media discourse analysis	Social movements	C:A		Advocacy through coercion and illegitimate actions of marginalised actors Individual actors influence norm adherence and violation Legitimacy through institutional conformity and decoupling from illegitimate actions Framework merges institutional and impression management
Garud and Karnoe, 2003	Historical analysis	Comparison – Danish, US wind turbine industries	C:D, C:CI, C:CNA C:CNN	✓	Distributed Agency
Garud, Jain and Kumaraswamy, 2002	Naturalistic inquiry, grounded theory	Sun Microsystems's sponsorship of Java technology	C:D, C:CI, C:CNA C:CNN		Institutional entrepreneurship Emergence of a technological field
Goodrick and Reay, 2010	Discourse analysis	Canadian nursing identities	C:CI, C:CNA		Constructing legitimate identities through rhetorical strategies
Khair and Wadhvani, 2010	Discourse analysis	Modern Indian Art market	C:CAN		
Kitchener, 2002	Interviews Document content analysis	Academic health centre mergers - UCSF/ Stanford merger	C:CNAC:T		Changing norms from field-specific healthcare norms to generalised private-sector, for-profit norms Theorising through narrative articulates causal relationships between institutional elements

Studies	Research Method	Research Setting	Type of IW	Coll- ective	Key Findings
Lawrence and Suddaby, 2006			C:A, C:V C:NN, C:T, C:E		
Lawrence, Hardy and Phillips, 2002	Qualitative, multi-case comparison	Palestinian child nutrition collaborations	C:CNN		Network of new institutions (proto-institution) establish in parallel with existing institutions
Lounsbury, 2001	Ethnographic Fieldwork Survey & Archival Event history analyses	University recycling programme staffing	C:CI C:E	✓	Constructing identities via collective action creates normative institution Educating through new skills and knowledge in a large population utilise templates
Lounsbury, 2002	Historical analysis	Professionalisation - finance field	C:V		Vesting involves sharing of coercive or regulatory authority
Lounsbury and Crumley, 2007	Ethnographic field approach Survey Archival event history analysis and Interviews	Active money management practice	C:D		Process perspective on practice creation
Maguire, Hardy and Lawrence, 2004	Critical discourse analysis Interviews Observation	Canadian HIV/AIDS treatment advocacy	C:CI C:CNA C:T	✓	
Munir and Phillips, 2005	Discourse analysis	Kodak popularisation of photography	C:CNA		Typology – institutional entrepreneur strategies New Technology
Oakes, Townley and Cooper, 1998	Interviews Observation Archival analysis	Alberta museum workers	C:CI C:T		• Field level identity shift constructed from outside professional groups (i.e. curators) • Bourdieu theory of field change Theorising by naming new business planning processes
Orsato, den Hond and Clegg, 2002	Political ecology framework analysis	Recycling -European auto industry	C:CNN	✓	• Network of industry groups Theorising by naming allows communication of new concepts
Paroutis and Heracleous, 2013	Interviews Archival analysis	Strategy	C:D, C:CI C:CAN, C:T C:E		Institutional entrepreneurs use first-order strategy discourse when adopting an institution
Perkmann and Spicer, 2008	Systematic literature review	Management fashions	C		Political, technical and cultural work

Studies	Research Method	Research Setting	Type of IW	Coll- ective	Key Findings
Quack, 2007		Transnational rule making- legal professionals	C:D	✓	Distributed agency
Rao, Monin and Durand, 2003	Analytical narrative Interviews Media	Nouvelle cuisine	C:CI		
Reay et al., 2013	Discourse analysis	Canadian health care organisations	C:CAN		Managerial actions that transform new ideas into practice at front-line micro level
Russo, 2001	Quantitative Event count and modeling	Independent power industry - government's formalisation of contract, exchange rate standards	C:D C:V		Defining work creates rules of exchange defining field boundaries Vesting through government changing division of exchange (i.e. production and pricing) with new actors
Wedlin, 2010	Interviews Document analysis	International rankings - management education	C:D		Rankings rhetorical device to construct/maintain legitimacy
Woywode, 2002	Survey Interviews	European auto industry	C:E		Educating through introduction of working groups
Maintaining n=7					
Angus, 1993	Narrative Analysis Ethnography Interviews Observation	Australian Christian Brothers College	M:VD M:M M:ER		• Valorising/demonising through public demonstrations of examples, Mythologising past examples of principles-competition, Embedding/routinising through education and implicit routines
Dacin, Munir and Tracey, 2010	Grounded theory Historical documents Interviews Observations	Formal dining - Cambridge dining halls	M:M M:ER		
Greenwood, Suddaby, and Hinings, 2002	Discourse Analysis Expansion Analysis Interviews	Professional associations (service firms)	M:E		Professional associations enable legitimacy by functioning as regulators through constitutive rules

Studies	Research Method	Research Setting	Type of IW	Coll- ective	Key Findings
Micelotta and Washington, 2013	Case Study Document Analysis Interviews	Italian professional services, related associations	M: E		Maintenance work includes repair work Professional associations resist coercive change from government
Rojas, 2010	Narrative analysis Archival Documents	Third World Strike - San Francisco State College	M:D		Deterring through power and coercion
Trank and Washington, 2009	Discourse analysis	AACSB	M:E M:D M:ER		<ul style="list-style-type: none"> • Maintaining professional associations and accreditation bodies' legitimacy • Practices of central agents maintain impact of institutions with competing sources of social and cultural capital, and responses of field members • IW intersects with traditional institutional research on structuration of organisational fields, institutionalisation of language, practice across organisations -Importance of field heterogeneity - interplay of institutional strategies and organisational identities
Zilber, 2009	Analysis of life stories collection - Links IW, narrative analysis	Israeli rape crisis centre	M:VD M:ER		Elite agents use stories to maintain organisational values
Disrupting n=7					
Ahmadjian and Robinson, 2001	Discourse analysis	Japanese permanent employment	D:DMF		Moral foundations of permanent employment disrupted by economic pressures
Bartlett and Tywoniak, 2007	Longitudinal case study Content analysis Interviews	Australian Public relations	D:DMF		Micro processes
Greenwood and Suddaby, 2006	Interviews Archival material	Big 5 Accounting Firms	D:DMF		Disruption spurred by largest firms and professional associations – Elite institutional entrepreneurship Paradox of embedded agency informed by boundary bridging and misalignment
Hardy and Maguire, 2010	Discourse analysis	DDT - Stockholm Convention	D:DSR D:DMF D:UAB		Narratives produce institutional change through domination, interpretation, translation
Sherer and Lee, 2002	Event history analysis	Large law firms	D:DMF		Disrupting through disassociative techniques used by elite firms – initial innovators using prestige
Singh and	Logic-Roles-	Pharmaceutical	D:UAB		Scripting-Role of clients' social knowledge in change

Studies	Research Method	Research Setting	Type of IW	Coll- ective	Key Findings
Jayanti, 2013	Action framework ODA	Industry			Identification of role enactment strategies, related tactics deployed by sales professionals. When strategy backfires, disrupts institutional structures intended to support.
Symon, Buehring, Johnson, and Cassell, 2008	Rhetorical analysis	Academic labour process	D:DMF		Quantitative research = illegitimate institutionalisation Qualitative research = legitimate resistance Discursive disruption through manipulation of contradictory meanings and functions of agency-structure discourse Political dimension to management research
Creating and Maintaining n=15					
Boxenbaum and Strandgaard Pedersen, 2009	Situated narrative	Scandinavian institutionalism	C:CNN, C:T M:ER		Main characteristics of Scandinavian institutionalism Agents respond to institutional pressures by adapting, mediating through loose coupling, sense-making, translation
Currie, Lockett, Finn, Martin and Waring, 2012	Archival data Interviews Observations	UK healthcare professionals	C:D C:CNN C:T, C:E M:P, M:ER		IW crosses categories – creating types used for maintaining
Fox-Wolfgramm, Boal and Hunt, 1998	Grounded theory Questionnaires Interviews, observations, documents	Responses to regulatory change – defender, prospector banks	C:D M:P		Definitional IW leads to field formal accreditation processes, standards creation, certification Organizational identity instrumental in resistance to coercive pressure, Structural, identity change not always linked
Galvin, 2002	Quantitative Event Count & modeling Poisson Process Archival analysis	Interest associations - U.S. health care	C:A M:E	✓	Policing through auditing new regulation Advocacy includes lobbying for resources, promoting agendas, proposing or attacking legislation. Interest associations different from market-based firms, influenced by institutional changes, carriers of institutions Associations enable legitimacy as regulators through constitutive rules
Gherardi and Perrotta, 2010	Document analysis Ethnographic studies Interviews	Medical assisted reproduction - Italy	C:D C:V M:E		Actor-network theory
Guler, Guillen and Macpherson, 2002	Quantitative Data analysis	ISO 9000 quality certification	C:D C:CNN M:E M:P	✓	Defining through certification Network of engineers, production managers diffuse ISO9000 in manufacturing -enables organisations to authorise compliance – distributed agency in maintaining institutions in large, geographic fields

Studies	Research Method	Research Setting	Type of IW	Coll- ective	Key Findings
					Policing through auditing, monitoring States, foreign multinationals key actors for coercive isomorphism, Cohesive trade relationships have coercive, normative effects Role-equivalent trade relationships result in imitation
Hargadon and Douglas, 2001	Historical analysis	Edison's development - electric light	C:M, C:E, M:D		Mimicry of existing technology enables adoption Educating through new skill development Deterring through threat of coercion - extra fees
Riaz, Buchanan and Bapuji, 2011	Discursive devices analysis (i.e. Rhetorical analysis) Business Media	Financial Crisis	C:T M:E		Different rhetorical processes used
Slager, Gond and Moon, 2012	Realist discourse analysis Interviews Archival documents	Investment index	C M:V		Standardisation
Thornton, 2002	Interviews Historical Analysis	College textbook publishing industry	C:V M:D		• Vesting through financial coercion of exogenous actors Policing through economic coercion - accounting practices
Townley, 1997	Interviews Quantitative analysis of documentation	Private-sector HR approach in UK universities	C:CNA M:D		• Changing norms from field-specific norms to generalised private-sector, for-profit norms • Embedding/routinising in formal, documented rhetoric
Townley, 2002	Interviews Observation Archival analysis	Alberta cultural organisations	C:M M:D		• Mimicry makes new institution (business techniques) understandable • Deterrence dependent upon legitimacy of coercive agent – Alberta government
Venkatesh and Natarajan, 2011	Case Study Interviews Document analysis	ICT community network Artifact	C:A C:D C:CI C:CNN M:ER M:M		• Artifact Maintenance different than stability • Gardening = maintenance metaphor
Washington, 2004	Qualitative: Historical analysis Quantitative: Time period analysis	National Collegiate Athletic Association	C:D M:E	✓	Major interest association emerged, transformed through changing membership criteria - maintain control over field structuration.

Studies	Research Method	Research Setting	Type of IW	Coll- ective	Key Findings
Zilber, 2002	Ethnography Interviews Narrative analysis Discourse analysis Conversation analysis Script Analysis	Israeli rape crisis centre	C:CNA M:ER		<ul style="list-style-type: none"> • Changing norms from political (feminist) to medical institution • Embedding/routinising through recruiting from network, consensus decision-making, talking in rotation
Creating and Disrupting n=3					
Baron, Dobbin and Jennings, 1986	Quantitative – Event counting	US Personnel Administration	C:V D:DSR		<ul style="list-style-type: none"> • Vesting involves sharing coercive, regulatory authority • Disruption easier in upheaval
Delbridge and Edwards, 2008	Interviews Archival data	Superyacht industry	C:CN D:UAB	✓	<p>Relational approach</p> <p>Multiple actors (not hero imagery of institutional entrepreneur) have agency, manipulate environmental structure</p>
Reay and Hinings, 2005	Discourse analysis	Alberta health care field	C:D, C:V D:DSR		<p>Radical change requires purposeful use of power to change field structure, dominant institutional logic</p>
Maintaining and Disrupting n=3					
Messeghem and Fourquet- Courbet, 2013	Discourse analysis - Weblogs	French mass retail	M:VD D:DMF		<p>Institutional entrepreneur utilised innovative discursive work</p>
Norback, 2011	Interviews Observations Archival analysis	Collaborative Swedish TV programme production	M:E D		<p>Theory of solutions looking for problems</p>
Wick, 2001	Textural analysis	Westray coal mining disaster	M:P D:UAB		<p>Institutionalised work practices enforced by punishing non-compliance</p> <p>Undermining of regulated institution (safety rules)</p>
Creating, Maintaining and Disrupting n=9					
Empson, Cleaver and Allen, 2013	Interviews External Publications Battilana et al.'s (2009) institutional entrepreneurship model	International law firms	C:A C:V C:CI M:P M:M M:E D:UAB	✓	<ul style="list-style-type: none"> • Individual level enabling conditions for IW • Simultaneous occurrence of 3 IW stages • IW of professionals leads to sedimentation • importance of dyadic relationship between senior professionals and professional managers, key institutional work, change processes in highly institutionalised settings

Studies	Research Method	Research Setting	Type of IW	Coll- ective	Key Findings
Helfen and Sydow, 2013	Interviews Textual Analysis	International Frameworks Agreement	Negotiating		<ul style="list-style-type: none"> Negotiating a discrete form of multiple IW
Hirsh and Bermiss, 2009	Historical Analysis	Transformation of Czech Republic from communist to capitalist state	C:V C:M C:CNN M:E D:UAB		Bridges IW categories to show link in action associated with creating, maintaining, disrupting institutions. Connects preserving institutions to decoupling Integration of material, symbolic
Holm, 1995	Historical case study, theoretical analysis – nested System perspective	Norwegian fishing industry - Advocacy by Fisherman's Association preserves interests in re-engineering through legislation of Norwegian fishing industry	C:A M:D D:DSA		Advocacy mobilises state power behind collective fishers' action, institutionalisation of fishers' interests in industry re-engineering Disruption of regulation through redefinition of allowable fish catch
Jarzabkowski, Matthiesen and Van de Ven, 2009	Longitudinal, real-time case study Observations Interviews Documentary analysis	Utility company	C:A M:E M:P M:ER D:DSR C,M,D		Response to opposing market, regulatory logics Actors maintain institutions operating in pluralistic environments which spur internal politics, where maintaining combines creating, disrupting strategies. Understanding dynamics of pluralism by organisational actors' practical work, complexity of creating, maintaining, disrupting Creating establishes space for action Mutual adjustment between logics key coping strategy
Jones, 2001	Historical Case Quantitative:time series Qualitative: historical accounts, narratives	Early American film industry	C:M M:P D:DSR		Mimicry of theatre symbols, artifacts Non-state actor policing through key technology patents, copyrights Disruption by courts rescinding patents
Lelebici, Salancik, Copay, and King, 1991	Historical case analysis	Early American radio industry	C:CNN M:E M:P D:UAB	✓	Actors' network wider than institutional entrepreneurs via patent pooling arrangements Enabling institutionalisation of radio through regulatory agencies– distributed agency maintaining institutions in large, geographic fields, Policing through ongoing disclosure of information , Disruption through undermining

Studies	Research Method	Research Setting	Type of IW	Coll- ective	Key Findings
					technical standards for small radio markets, new advertising formats
Zietsma and Lawrence, 2010	Interviews Field research Organisational documents Media reports	British Columbia Forest Industry	C:D M:VD D:DMIF		Practice work Interplay of practice work, boundary work
Zietsma and McKnight, 2009	Longitudinal Case study of Proto-institutions Interviews Discourse analysis – organisational documents, news articles, press releases, 3 rd party reports	British Columbia Forest Industry	C:CNN M:D M:VD D:DSR D:DMIF		<ul style="list-style-type: none"> • C,M,D Work inter-related • IW involves iterative phases of conflict, cooperation – “collaborative co-creation”, “competitive convergence” • Iterative nature if IW outcomes rarely unilateral, compromised product of bouts of conflict/cooperation • Process of purposive action produces unintended consequences. • End product reflects actors’ values, interests

Source: Developed for this Study.

Appendix B
Table 4.2: Catalogue of Archival Documentation over Time

#	Title	Description
1993 n=1		
84	Contract for Service with Eatons – EATONS School of Retailing	1 page
1994 n=12		
12	A Whole New Way: The Development and start-up of the Eaton School of Retailing	62 pages, Cerlox bound
56	Deverell, J. (December 9, 1994) Eaton's creates Ryerson retail chair. <i>The Toronto Star</i>	1 page
57-64	Local newspaper articles – same copy: Vancouver, Hamilton, Victoria, Kelowna, Cornwall, Lethbridge, Saint John, Chatham	
101	Healing, D. (Sept. 23, 1994) Eaton nixes sale rumors. <i>The Edmonton Sun</i>	1 page
102	Heinzl, J. (Dec. 6, 1994) Eaton's expected to take retailing school national. <i>The Globe and Mail</i>	1 page
1995 n=18		
1	Eaton's 2000: 1995 Year End Report	
35	Five Key Factors that distinguish CEOs of Companies with successful corporate universities, Corporate University Xchange, July/August, 1995, vol. 1, no.4, p. 6	1 paragraph
86	Eaton School of Retailing: Courses available to suppliers (1995), Ontario Apparel Manufacturers' Association Newsletter	1 page
87	Just in Time, Back to School (November/December, 1995) <i>Canadian Retailer</i> , p. 15	1 page
88	Alaton, S. (December 19, 1995) The learning organization. <i>Globe and Mail</i> ,	1 page
89	Burn, D. (November, 1995), Partners in Learning. <i>Human Resources Professional</i> , pp. 7-10.	1 page
90	Start your career path by challenging your mind. (Aug. 24, 1995) <i>Financial Post</i>	1 page
91	Eaton's and Ryerson focus on retail, (Apr. 1995) <i>University of Manitoba University Affairs</i>	1 page
92	Eaton's new Chair at Ryerson promotes retail education, (Feb. 1995) <i>Home Style, Canada's Housewares Magazine</i>	1 page
93	Lewington, J. (January 19, 1995) Academic, lobbyist appointed Ryerson university president. <i>The Globe and Mail</i>	1 page
94	Eaton Project a leadership opportunity. (Spring/Summer, 1995) <i>Ryerson Rambler</i>	1 page
95	Eaton's funds CD-ROM in retail. (Oct. 20, 1995) <i>Ryerson Forum</i>	1 page
96	O'Brien, G. (August 14, 1995) Eaton's: We want to be your school. <i>Style Magazine</i>	1 page
97	Eaton Chair a 'pioneering venture', (Jan. 13, 1995) <i>Ryerson Forum</i>	1 page
98	Eaton Chair Announced (April, 1995) <i>Centre for the Study of Commercial Activity Newsletter</i> , vol 3, No. 1	1 page
99	A Canadian Success Story: John Craig Eaton visits the business school (Spring, 1995) <i>University of Alberta, The Edge</i>	1 page
100	Sheerin, M. (March, 1995) Ryerson finalizes Eaton's deal, <i>Ryerson Night Views</i>	1 page
103	Fox, J. (Jan. 16, 1995) Canadian retailers to counter U.S. presence, <i>Discount Store News</i> , p. 3	1 page
1996 n=30		
4	The Structure of Demand and Societal Need for Retail Education with an Emphasis on Ontario	22 pages
5	Retail Management Education: A Review of Current Undergraduate Programs	47 pages, Cerlox Bound

#	Title	Description
8	Retail & Services Management I	6 pages
9	The Eaton Chair in Retailing, 1996	6 pages
10	Proposed Five year Work Plan: Eaton NSERC-SSHRC Chair in the Management of Technology in Retailing	6 pages
16	Chair to study technological change in retailing. <i>Ryerson Report</i>	
23	The Training Technology Monitor: Case Study Five: Learnware in Prototype Eaton School of Retailing and Ryerson Polytechnic University - Partnering for Learnware: Critical Success Factors in the Use of Learnware by the Human resources Sector Councils and Industry Associations in Canada,	4 pages
25	Canadian Retail Management Education Program: Retailing as a Career: brochure	2 page
26	Make the Most of it: Tips for Students	20 pages booklet English and French
27	Retailing as a Career: Newsletter of the Canadian Retail Management Education Program (April, 1996), Issue 1	4 pages
28	Retailing as a Career: Newsletter of the Canadian Retail Management Education Program, (August, 1996), Issue 2	4 pages
36	The Canadian Retail Industry & Skill Standards	11 pages, Cerlox bound
37	IAS-Human Resources Development Canada: ESR Careers in Transition Job Search/Job related skills committee	
41	A Presentation to the I.A.S. Committee The Structure of Demand and Societal Need for Retail Education with an Emphasis on Ontario	11 Overhead Slides
45	Presentation of IAS Sub Committee #4: Promotion and Marketing of the Canadian Retail Management Education	2 pages
55	The Alliance of Ryerson Polytechnic University, Eaton School of Retailing and Bell Canada: A Business Plan for Distance and Technology Enhanced Education Prepared by the Alliance	45 pages, Cerlox bound
65	McGugan, I. (March, 1996), Eaton's on the Brink. <i>Canadian Business</i>	2 pages
67	Kingston, A. (May, 1996) Rush Hour at Eaton's, <i>Report on Business Magazine, The Globe and Mail</i>	10 pages
69	Knight, C. (March 25, 1996) Retail charts training course. <i>Canadian HR Reporter</i>	4 pages
71	Kearns, G. (Sept/Oct, 1996) Retail Goes Back to School. <i>Apparel</i>	3 pages
72	A Whole New Way. <i>Canadian Gift & Tableware Association Retail News</i>	
73	Staff Development & Motivation - Special Achievement. <i>Canadian Retailer</i>	
74	(1996) An apple for the CD-ROM, <i>Style</i>	1 page
75	Knight, C. (1996). Reading, 'riting and retail: Eaton's and Ryerson University partner to create a much-needed educational initiative for the beleaguered retail sector. Trade publication	3 pages
76	Smith, E. (November/December, 1996) Canadian CU spearheads national retail education effort. <i>Corporate University Review</i>	1 page
77	Corporate and Campus-Based B-Schools Take Strategic Approach to Alliances, <i>AACSB Newsletter</i> , Vol. 28, No. 1	
78	Retail chair is joint project with Eaton's, <i>Style magazine</i> (March 29, 1996)	1 page
79	Smith, L. and Smith, M. (1996) Retailing as a career? <i>Home and Hardware "Centre"</i>	1 page
80	Menzies, D. (May/June, 1996) Building Blocks for Success. <i>Canadian Retailer</i>	2 pages
82	1996 NOVA Corporation Global Best Partnerships IdeaBook: Partnering for Excellence in the Retail Sector	

#	Title	Description
1997 n=25		
2	Overall Direction for the Eaton School of Retailing from 1997 to the year 2000	2 pages
6	Analysis of Educational Needs Assessment of Retail Employees	60 pages, Cerlox Bound
14	Retail Management – Internet course descriptions	Brochure
17	Ryerson finds niche with retail degree, <i>Forum: A Ryerson University Publication</i> , Vol. 23, No. 4, (October 24, 1997)	Student newspaper
18	McConnell, A. (Feb. 12, 1997) Rye's readying for retail: New management school may open in '98. <i>The Ryersonian</i>	Student newspaper
22	The Retail Sector buys into distance education. <i>The Training Technology Monitor</i> , Vol. 4, No. 5	8 pages
24	Canadian Retail Management Education Program – Partnership	7 page
29	Retailing as a Career: Newsletter of the Canadian Retail Management Education Program	4 pages
32	Canadian Retail Management Education Program Overview	5 pages
34	Launching and Managing a Corporate University: How Eaton's is Showing Success in Transforming Capital into a Competitive Advantage	8 pages
38	IAS-Human Resources Development Canada: ESR Careers in Transition Job Search/Job related skills committee	5 pages
39	IAS-Human Resources Development Canada: ESR Careers in Transition Job Search/Job related skills committee	9 pages
40	IAS-Human Resources Development Canada: ESR Careers in Transition Job Search/Job related skills committee	3 pages
42	Steering Committee IAS Initiative for Retail Educational Programming	4 pages
44	Getting the Most out of Learning: A Qualitative Evaluation of the Eaton School of Retailing	66 pages, Cerlox bound
46	Proposal to the Office of Learning Technologies: Development of an Evaluation Model for technology Enhanced Learning in Retailing (includes 10 endorsement letters)	35 pages
47	Report on the Industrial Adjustment Services Initiative in Retail Management Education	22 pages, Cerlox bound
48	Proposal to Department/School Councils for an Undergraduate Degree in Retail Management	9 Pages
50	Proposal for creation of NSAS Committee	10 pages
51	NSAS Steering Committee: Career Awareness/Technology Enhanced Learning/Standards & Certification	4 pages
52	Proposal for NSAS Initiative for Career Awareness and Technology Enhanced Learning in Retailing, 1997	17 pages
53	Proposal for Creation of a Retail Sector Initiatives Fund Curriculum Committee	30 pages
66	Shoalts, D. (March 27, 1997) Filling a gap in retail economy. <i>The Globe and Mail</i>	
83	Harvard University Graduate School of Education	25 pages
85	Memo to The Editor, <i>The Globe and Mail Report on Business Magazine</i> , Re: Hot Seats, Feb. 1997	1 page
1998 n=5		
13	Certificates in Retail and Services Management	Brochure
21	Ryerson's online retail courses will be learner-driven, <i>The Training Technology Monitor</i>	2 pages
30	Retailing as a Career: Newsletter of the Canadian Retail Management Education Program	4 pages
54	The Accidental Career: a Report on Careers in Retailing: How to Make Retailing a Career of Choice	210 pages, Cerlox Bound
68	Internet Learning: Now retail managers can participate in Ryerson University's new retail focused degree program over	3 pages

#	Title	Description
	the internet. <i>Furniture World</i>	
	1999 n=8	
3	The Eaton Legacy: Re-Inventing Retail Education	135 pages, Cerlox bound
7	Retail Management Program	2 pages
19	Retail Careers That Suit Your Style	
20	Virtual Course Design for Educators & Trainers: The Evaluation Model for Technology Enhanced Learning in Retailing.	241 pages, Cerlox bound
31	A Model for Developing Intellectual Capital in Retailing	13 pages
43	Occupational Standards: Delivering retail professionalism - A Report on Occupational Standards for the positions of: Retail Sales Associate, Retail First Level Manager	121 pages, Cerlox Bound
49	Summary of Funding	3 pages
81	Meister, J.C. (1999) <i>Corporate Universities: Lessons in Building a World-Class Work Force</i>	
11	The Eaton Chair in Retailing	5 pages
15	The Corporate Squeeze: Ryerson Polytechnic Incorporated, <i>Night Views</i>	
33	Designing a Virtual Corporate University: Using distance Learning to Train Retail Employees	4 pages
70	Jay, P., Education is a partnership at the Eaton's School of Retailing. <i>Workplace News</i>	2 pages
77	Corporate and Campus-Based B-Schools Take Strategic Approach to Alliances, <i>AACSB Newsletter</i> , Vol. 28, No. 1	

Table 4.8: Analytic Codebook

Code	Theme	Definition	Sources	Descriptions/ Empirical Examples
C:A	Advocacy	Mobilisation of political and regulatory support through direct and deliberate techniques of social suasion	Lawrence and Suddaby (2006)	Federal government commissions retail sector survey
C:AR	Resources	Interorganisational actors have resources to mobilise action	Fligstein and McAdam (2012, 2011)	Document #49: Funding summary
C:D	Defining	Construction of rule systems that confer status or identity, define boundaries of membership or create status hierarchies within a field.	Lawrence and Suddaby (2006)	Document #13: Degree/certificate curriculum
C:V	Vesting	Government authority used to reallocate property rights	Lawrence and Suddaby (2006)	Document #49: Funding summary
C:CI	Constructing Identities	Defining relationship between actors and fields in which they operate	Lawrence and Suddaby (2006)	
C:IGMT	Collective Identity	Generalised membership ties -based on connection to an issue	Hardy et al., 2005	Canadian retail industry
C:IPMT	Collective Identity	Particularised membership ties - certain stakeholders included, patterns of interdependence established, authority conferred, roles/responsibilities assigned	Hardy et al., 2005	ESR, IAS and NSAS committees – i.e. Document #50
C:CNA	Changing Normative Associations	Re-making connections between sets of practices and moral and cultural foundations of practices	Lawrence and Suddaby (2006)	
C:CNADE	C:CNADE =Retail management	Innovative actions in strategic action field of retail management education	Fligstein and McAdam (2012, 2011)	Document #22: Training Technology Monitor
C:CNALO	C:CNALO=Retailers should be learning organisations			
C:CNACU	C:CNACU=Corporate university			
C:CNALC	C:CNALC=Innovative curriculum			
C:CNAM	Genres: Marketing	Produced to increase registrations	Maguire (2004)	Doc. #24: Retail Management Internet course descriptions

Code	Theme	Definition	Sources	Descriptions/ Empirical Examples
C:CNAT	Genres: Technical	Produced to add to knowledge of public-private development of retail management degree	Maguire (2004)	Doc. #34: Launching and Managing a Corporate University
C:CNAP	Popular	Produced for mass readership to inform, shape public opinion	Maguire (2004)	Docs. #57-64: Local newspaper articles
C:CNAPY	Policy	Produced to influence government	Maguire (2004)	Doc. #52: Proposal for NSAS Initiative for Career Awareness and Technology Enhanced Learning in Retailing
C:CNAO	Other – Field	Produced to inform/shape industry opinion	ESR Study	Doc. #17: Ryerson finds niche with retail degree
C:CNN	Constructing Normative Networks	Interorganisational connections through which practices become normatively sanctioned, form relevant peer group for normative compliance, monitoring, evaluation.	Lawrence and Suddaby, 2006	
C:CNNI	Interorganisational Collaboration: Involvement	Deep interactions among participants, partnership agreements, bilateral information flows	Lawrence et al. (2002)	Document #84: Contract for ESR – Eaton's and Ryerson
C:CNNE	Interorganisational Collaboration: Embeddedness	Interactions with third parties, representation arrangements, multidirectional information flows	Lawrence et al. (2002)	Document #84: Contract for ESR – Eaton's and Ryerson
C:M	Mimicry	Draws on existing patterns of action to articulate, legitimate new ones	Lawrence and Suddaby (2006)	Benchmarking US corporate universities
C:T	Theorising	Development, specification of abstract categories, elaboration of chains of cause, effect	Lawrence and Suddaby (2006)	
C:TPJC	Professionalisation: Jurisdictional Claims	Market value, viability of occupation, membership	Muzio et al. (2011); Arndt and Bigelow (2005)	Document #86: Eaton School of Retailing – Courses available to suppliers Discourse #11: Retail industry is an important economic contributor
C:TPBOK	Professionalisation: Body of Knowledge	Co-production of knowledge with industry, situated knowledge, focus on competencies	Muzio et al. (2011); Arndt and Bigelow (2005)	Document #9: The Eaton Chair in Retailing, 1996 Document #95; Eaton's funds CD-ROM in retail

Code	Theme	Definition	Sources	Descriptions/ Empirical Examples
C:TPEP	Professionalisation: Education of Practitioners	Specified educational requirements	Arndt and Bigelow (2005)	Doc. #32: Canadian Retail Management Education Program Overview Doc. #43: Occupational Standards: Delivering retail professionalism
C:TLAP	Legitimation – Authorisation: Personal	Individual has legitimate authority because of institutional status or role	Van Leeuwen (2007)	Document #99: "A Canadian success story: John Craig Eaton visits the business school."
C:TLAE	Legitimation – Authorisation: Expert	Legitimacy provided by expertise	Van Leeuwen (2007)	Document#23: The Training Technology Monitor: Case Study Five: Learnware in Prototype Eaton School of Retailing and Ryerson Polytechnic University
C:TLARM	Legitimation – Authorisation: Role Model	Role models' behaviour legitimatises followers' actions	Van Leeuwen (2007)	Document #96: "Eatons: we want to be your school"
C:TLAI	Legitimation – Authorisation: Impersonal	Impersonal authorities include laws, policies, regulations, rules.	Van Leeuwen (2007)	Document#48: Proposal to Department/School Councils for an Undergraduate Degree in Retail Management
C:TLAT	Legitimation – Authorisation: Tradition	What has always been done	Van Leeuwen (2007)	Document #15: "The Corporate Squeeze: Ryerson Polytechnic Incorporated"
C:TLAC	Legitimation – Authorisation: Conformity	"What everybody else does"	Van Leeuwen (2007)	Document #35: "Five Key Factors that distinguish CEOs of companies with successful corporate universities"
C:TLME	Legitimation – Moral Evaluation: Evaluation	Utilises evaluative adjectives	Van Leeuwen (2007)	Corporate-university, partnership,
C:TLMEA	Legitimation – Moral Evaluation:	Refers to practices in abstract ways to moralise them	Van Leeuwen (2007)	Document #3: The Eaton Legacy

Code	Theme	Definition	Sources	Descriptions/ Empirical Examples
	Abstraction			Document #12: A Whole New Way
C:TLRI	Legitimation – Rationalisation: Instrumental	goals, means, effects	Van Leeuwen (2007)	
C:TLRT	Legitimation – Rationalisation: Theoretical	x defines y, do x because....,	Van Leeuwen (2007)	Document#2: Overall Direction for the Eaton School of Retailing from 1997 to the year 2000
C:TLMS	Legitimation – Mythopoeis: Stories	Rewards for engaging in legitimate practices	Van Leeuwen (2007)	n/a
C:TLMC	Legitimation– Mythopoeis: Cautions	What will happen if non-conformance	Van Leeuwen (2007)	n/a
C: E	Educating	Provides actors with knowledge necessary to use/interact with new structures	Lawrence and Suddaby (2006)	
M:E	Maintaining: Enabling	Creating rules to facilitate, supplement support institutions, including creating authorising agents/new roles, diverting resources required for institutional survival	Lawrence and Suddaby (2006)	Document #101: Eaton's nixes sales rumours
M:P	Maintaining: Policing	Ensuring compliance through enforcement, auditing, monitoring	Lawrence and Suddaby (2006)	n/a
M:D	Maintaining: Detering	Establishing coercive barriers to institutional change	Lawrence and Suddaby (2006)	n/a
M:VD	Maintaining: Valorising/ Demonising	Providing especially positive, negative examples illustrating normative foundations of institutions	Lawrence and Suddaby (2006)	
M:VDT0	Maintaining: Threat/Opportunity	Threat or opportunity exists in external environment, so need to maintain viability.	Fligstein and McAdam (2012, 2011)	Discourses #31 • US, global retailers threaten viability of Canadian retailing. • Dearth of Canadian retail management education
M:M	Maintaining: Mythologising	Preserving normative underpinnings of institutions by mythologising history	Lawrence and Suddaby (2006)	n/a
M:ER	Maintaining:	Infusing normative foundations of institutions into	Lawrence and	n/a

Code	Theme	Definition	Sources	Descriptions/ Empirical Examples
	Embedding and routinizing	participants' routines, organisational practices.	Suddaby (2006)	
D:DSR	Disrupting:Disconnecting sanctions /Rewards	Working through state apparatus to disconnect rewards, sanctions from practices, technologies or rules	Lawrence and Suddaby (2006)	n/a
D:DMF	Disrupting:Disassociating Moral Foundations	Disassociating practices, rules or technologies from moral foundations as appropriate within cultural contexts	Lawrence and Suddaby (2006)	Discourse #13: Development of Canadian retail management degree program includes innovative university program development process. Document#31
D:UAB	Disrupting:Undermining assumptions and beliefs	Removing costs, facilitating new ways of acting – replacing existing templates, or decreasing perceived risks of innovation, differentiation	Lawrence and Suddaby (2006)	n/a